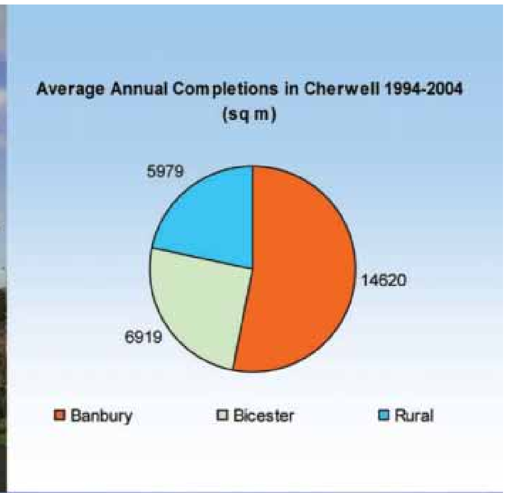
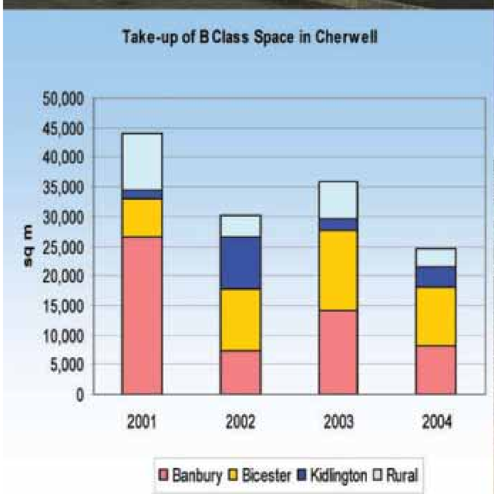
URS

Final Report

Cherwell District
Employment Land Review





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Cherwell District

Employment Land Review

18 July 2006

Final Report

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LIMITATION

URS Corporation Limited (URS) has prepared this Report for the sole use of Cherwell District Council in accordance with the Agreement under which our services were performed. The conclusions and recommendations contained in this Report are based upon information provided by others and upon the assumption that all relevant information has been provided by those parties from whom it has been requested. Information obtained from third parties has not been independently verified by URS, unless otherwise stated in the Report.

Where field investigations have been carried out, these have been restricted to a level of detail required to achieve the stated objectives of the services. The results of any measurements taken may vary spatially or with time and further confirmatory measurements should be made after any significant delay in using this Report.

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ABBREVIATIONS

ABI	Annual Business Inquiry
CDC	Cherwell District Council
HGV	Heavy Goods Vehicle
LDD	Local Development Document
LDF	Local Development Framework
LDS	Local Development Scheme
OCC	Oxfordshire County Council
ODPM	Office of the Deputy Prime Minister
OI	Oxford Innovation
ONS	Office of National Statistics
PPG	Planning Policy Guidance
PPS	Planning Policy Statement
SPD	Supplementary Planning Document
SPG	Supplementary Planning Guidance
RES	Regional Economic Strategy
VOA	Valuation Office Agency

1. INTRODUCTION

1.1. Context and Purpose

URS were commissioned by Cherwell District Council to undertake an employment land review to assess the quantity, quality and viability of employment land throughout the District.

The need for such studies has been emphasised with the advent of the latest revisions to the ODPM's Planning Policy Guidance Notes (PPG 3) Housing made in January 2005. PPG 3 suggests that local planning authorities should review all their non-housing allocations when preparing their development plan and consider whether some of this land might be better used for housing or mixed-use development. Of particular importance to employment policy and reviews such as this is new paragraph 42(a) which states:

'Local planning authorities should consider favourably planning applications for housing or mixed use developments which concern land allocated for industrial or commercial use in saved policies and development plan documents or redundant land or buildings in industrial or commercial use, but which is no longer needed for such use, unless any of the following apply:

- *It can be demonstrated, preferably through to an up-to-date review of employment land, that there is a realistic prospect of the allocation being taken up for its stated use in the plan period…'*

Cherwell District Council is in the process of preparing their Local Development Framework (LDF) and this study will forma an important element of this work.

This study will also play an important function in helping to determine planning applications and respond to planning appeals.

1.2. Study Area

The study area included the whole of Cherwell District in North Oxfordshire. The majority of employment areas are located in the towns of Banbury and Bicester, including sites within established industrial areas (comprising mainly B2 industry and B8 warehouse uses). There are also a few designated sites located in the more rural areas of the District such as those in or around Kidlington, Adderbury, Upper Heyford, Hook Norton and Deddington.

1.3. Report Structure

The report sets out our key findings and policy recommendations for employment land in the District of Cherwell based on a comprehensive desk review and socio-economic analysis; individual employment site appraisals; a review of historical trends in the commercial and industrial property sectors; and a forecasting exercise.

The remainder of this report is structured as follows:

- Section 2 gives detail of our approach to the various research elements of the assignment;
- Section 3 describes the national, regional and local policy context of particular relevance to employment land and related issues in Cherwell District;
- Section 4 provides a comprehensive analysis of socio-economic baseline conditions in Cherwell District relative to Oxfordshire, the South East and Great Britain;
- Section 5 provides an analysis of the local business and employment structure of Cherwell District relative to Oxfordshire, the South East and Great Britain;
- Section 6 sets out the key findings of our employment land area appraisals and summarises key qualitative and quantitative results;
- Section 7 describes the employment land market in Cherwell District and how it interacts with sub-regional markets in the wider region;
- Section 8 presents our approach to forecasting based on past trends in demand. This section also sets out the overall supply of land in Cherwell and the wider regional area;
- Section 9 uses the information presented in Section 8 to estimate the years supply of land available in Cherwell District, providing the basis for conclusions regarding the allocation of land presented in Section 10;
- Section 10 presents conclusions and recommendations for the retention or release of employment land sites.

2. APPROACH

2.1. Introduction

There are a number of research elements informing this study, which are outlined in more detail below. These include:

- Labour and business profiling
- Employment land surveying and appraisal
- Market and demand assessment

2.2. Employment and Business Profiling

A socio-economic analysis was undertaken of Cherwell District within the context of Oxfordshire, the South East and Great Britain as a whole in order to provide an in-depth understanding of the current population and socio-economic make-up of the District. A number of information sources were reviewed including:

- Annual Business Inquiry
- Census Data
- Annual Population Survey
- Local Labour Force Survey
- VAT Registrations

In addition a baseline assessment of the existing economic structure and key trends in employment related development was completed. This work involved:

- A review of historical employment information for the District, including information on workforce characteristics, unemployment, occupation, earnings and travel to work information;
- A review of the local economy and business trends within the District;
- An analysis of potential growth sectors.

2.3. Employment Land Survey

This work began with a desk-based review and mapping exercise of all the existing employment areas within the District in order to identify potential sites to be targeted for survey, along with the broad employment areas and constraints. The consultancy team then visited all employment areas within the main centres of Banbury and Bicester to undertake an initial visual assessment and scoping exercise.

Following a meeting with the Council it was agreed that 37 employment clusters would be surveyed, the survey schedule and cluster overview maps are in **Appendix A.** Clusters were made up of existing business and industrial estates as well as designated sites for development. **Appendix B** contains maps of each of the employment clusters including identified potential development areas.

Strategic Site Appraisal Criteria

Each employment cluster was then revisited and surveyed against an agreed set of strategic site appraisal criteria in order to test sustainability. The criteria used are based on our experience of similar studies and the ODPM Employment Land Reviews: Guidance Note, 2004. They include:

- Existing employment use / activity;
- Strategic access (external and internal road access and access to public transport);
- Neighbourhood issues (i.e. noise & air pollution, smell, HGV traffic etc);
- Amount of vacant and derelict land and/or buildings (including mapping relevant sites);
- Quality of environment (streets, public realm, lighting etc.);
- Servicing and parking (on or off road, congestion);
- Building conditions (as a percentage of all buildings within the cluster);
- Proximity to other land uses (i.e. residential, retail etc).

The surveyors used a pro-forma questionnaire along with a map of each employment area to undertake the survey. The questionnaire included a series of tick-box style and open-ended questions. This approach allowed for a qualitative and quantitative analysis to be undertaken.

Prior to going on site surveyors attended a briefing and were given a survey pack which included guidance on how each of the different questions should be completed to ensure that questions were answered consistently throughout the survey. A copy of the strategic cluster survey questionnaire is included at **Appendix C**. The strategic site surveys were completed in December 2005.

2.4. The Employment Land Market

The commercial surveying firm of Vail Williams were asked to provide some commentary on Cherwell's employment land market. This work entailed telephone based research to gather perceptions on the general state and direction of the market for commercial property and employment land. The main focus of the research was to provide an understanding of whether the District has distinct market areas and, if so, how they interrelate.

2.5. Demand and Supply Analysis

URS carried out an exercise to collate information on the amount of employment land in Cherwell District using information provided by the Council and further information gathered through the site assessment survey to determine the total amount of land in employment use. As part of this exercise we also identified the amount of land available for potential development, which included UDP proposal sites identified by the Council and vacant sites or sites with vacant and/or derelict buildings as identified through the employment land survey.

Supply information was also gathered for surrounding districts in Oxfordshire to gain an understanding of the overall amount of land available in the County for employment development. URS contacted each of the local authorities to get their views on the constraints and opportunities effecting employment development in each district. This fed into our demand analysis to determine the amount of demand that could be redistributed to Cherwell from neighbouring districts if there was limited land availability in those districts.

Land demand was assessed by using past completions data as a proxy for demand. Completions data provides information on what actually has happened in the District with regard to employment land development and gives a good indication of trends that would be expected to continue into the future.

By comparing the employment land supply to the demand based on past completions we were able to provide an estimate of the total number of years supply available for development in Cherwell District.

3. POLICIES AND PROGRAMMES

3.1. Introduction

This section provides a brief overview of the strategy and policy context relevant to employment and employment land in Cherwell District, including national, regional and local plans and development strategies.

3.2. National Policies

Planning Policy Guidance Notes (PPGs) produced by the Office of the Deputy Prime Minister provide a national guidance framework setting out a range of planning principles and objectives on specific topics.

PPS1 (Delivering Sustainable Development) emphasises the important role that the planning system has in the delivery of sustainable development. PPS1 encourages local authorities to recognise wider sub-regional, regional or national benefits of economics development and consider these alongside adverse local impacts.

Reference is given to the UK's strategy on sustainable development[1], which emphasises the role of planning to provide attractive places to live and work and development patterns which minimise the need to travel.

PPG2 (Green Belts) sets out the Governments intentions toward the conservation of Green Belts and also their contribution towards sustainable development objectives. The guidance works on the *'presumption against inappropriate development within Green Belts and refines the categories of appropriate development, including making provision for the future of major existing developed sites and revising policy on the re-use of buildings.'*

PPG3 (Housing)[2] has three key objectives: widening housing opportunities and choice; maintaining the supply of housing; and creating sustainable residential environments. The guidance promotes the efficient use of land for housing development through re-use of previously developed land and empty properties and the conversion of non-residential buildings for housing to meet housing demand and minimising the amount of green field land being taken for development. It provides advice on the provision of affordable housing as a means of creating mixed and balanced communities.

The update to PPG3 in January 2005 has increased the pressure on employment land putting the onus on local authorities to prove the demand for such land. New paragraph 42 (a) states:

'Local planning authorities should consider favourably planning applications for housing or mixed use developments which concern land allocated for industrial or commercial use

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[1] Sustainable Development: The UK Strategy (1994)
[2] Released in 2000, Update January 2005

in saved policies and development plan documents or redundant land or buildings in industrial or commercial use, but which is no longer needed for such use, unless any of the following apply:

- *The proposal fails to reflect the policies in this PPG (including paragraph 31), particularly those relating to a site's suitability for development and the presumption that previously-developed sites (or buildings for re-use or conversion) should be developed before greenfield sites;*
- *The housing development would undermine the planning for housing strategy set out in the regional spatial strategy or the development plan document where this is up-to-date, in particular if it would lead to over-provision of new housing and this would exacerbate the problems of, or lead to, low demand;*
- *It can be demonstrated, preferably through an up-to-date review of employment land[1] (refer to Annex D for practice guidance), that there is a realistic prospect of the allocation being taken up for its stated use in the plan period or that its development for housing would undermine regional and local strategies for economic development and regeneration.'*

The ODPM is in the process of replacing many of their PPGs with Planning Policy Statements (PPS) and whilst writing this report the ODPM has produced their draft PPS3 (Housing). PPS3 has been developed taking account of research into and a review of the implementation of PPG3. Once adopted PPS3 will replace PPG3 as the planning strategy for housing in England.

With regard to employment land and employment land review paragraph 41 states:

'When considering planning applications for housing which are received in advance of the relevant development plan document being reviewed (particularly first development plan document), local planning authorities should take into account the policies in this statement as material considerations, as they may carry greater weight than the relevant policies in the development plan. In these circumstances or for sites not allocated in the development plan, local planning authorities should consider favourably planning applications for housing development:

- *Where there is evidence of an imbalance between housing demand and supply, having regard to affordability issues and housing market conditions;*

- *If the site is suitable for housing development (including land allocated or previously used for industrial or commercial use, which is no longer needed for that use – as demonstrated by an up-to-date review of employment land); and*

- *The planning proposal makes efficient use of land, offers a good housing mix, is of high quality design and does not have an unacceptable impact on the environment.'*

PPG4 (Industrial, Commercial Development and Small Firms) notes that policies within the development plans should provide for choice, flexibility and competition in allocating land for industry and commerce. The guidance recommends that planning authorities should be realistic in their assessment of the needs of business.

PPS6 (Planning for Town Centres) covers town centres and focuses on ways to promote town centre vitality and viability, such as:

- Planning for growth and development of existing centres;
- Promoting and enhancing existing centres, by focusing development in such centres;
- Encouraging a wide range of services in a good environment, accessible to all.

PPS 6 highlights the need to make efficient use of land and encourages well-designed, higher density, multi-storey development within and around existing centres. PPS6 encourages local authorities to make better use of existing land and premises and if required identify new development sites following a sequential approach. A sequential approach requires that locations be considered in the following order:

- First, locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become, available within the development plan document plan document period, taking account of an appropriate scale of development in relation to the role and function of the centre;
- Second, edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre;
- Third, out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

PPS7 (Sustainable Development in Rural Areas), which replaces PPG7, notes that development plan policies should facilitate and promote sustainable patterns of development and sustainable communities in rural areas. The guidance recommends that new development should take place in or near to local service centres where employment, housing, services and other facilities can be provided close by.

Regarding economic development and employment, PPS7 states that local authorities should:

- Identify in Local Development Documents (LDDs) suitable sites for future economic development, particularly in those rural areas where there is a need for employment creation and economic regeneration.

- Set out in LDDs their criteria for permitting economic development in different locations, including the future expansion of business premises, to facilitate healthy and diverse economic activity in rural areas.

3.3. Regional Policies

Regional Planning Guidance for the South East (RPG9)

RPG9 is produced to provide a regional planning and development framework for county, unitary and district authorities in the South East of England. It covers the period up to 2016 setting the framework for the long-term future.

RPG9 sets out a vision for the South East and key development principles aimed at achieving that vision. The vision is one of encouraging economic success throughout the region, ensuring a higher quality environment with the management of natural resources, opportunity and equity for the Region's population, and a more sustainable pattern of development.

The main development principles used throughout the Guidance, which are particularly relevant to this study, are that:

- Urban areas should become the main focus for development through making them more attractive, accessible and better able to attract investment;
- The pattern of development should be less dispersed with more sustainable patterns of activity, allowing home, work, leisure, green spaces, cultural facilities and community services to be in closer proximity;
- Access to jobs, services, leisure and cultural facilities should be less dependent on longer distance movement and there should be increased ability to meet normal travel needs through safe walking, cycling and public transport which reduces reliance on the car.

RPG9 states that *'industry and business development should be sustainable, both in the ease of access by walking, cycling and public transport, and in the layout and design of development.'*

Cherwell District, as part of Oxfordshire County, forms part of the Western Policy Area referred to in RPG9 and the draft South East Plan. The economy in the Western Policy Area is described as *'relatively buoyant with a strong representation in a range of high-tech industries but is constrained by tightness in the labour market, housing and property markets and by transport issues.'* RPG9 suggests growth in this area needs to be in a sustainable manner, minimising pressure on limited labour and natural resources, while building on the area's economic strengths.

RPG9 policies important to employment and employment land are:

Policy RE5: Better use should be made of existing employment land resources. Sites for industry and commerce should be developed particularly in urban areas and in places that are accessible by environmentally friendly modes of transport. Precedence should be given to the re-use of developed land over the release of new land and wherever possible the intensification of use on existing sites should be encouraged.

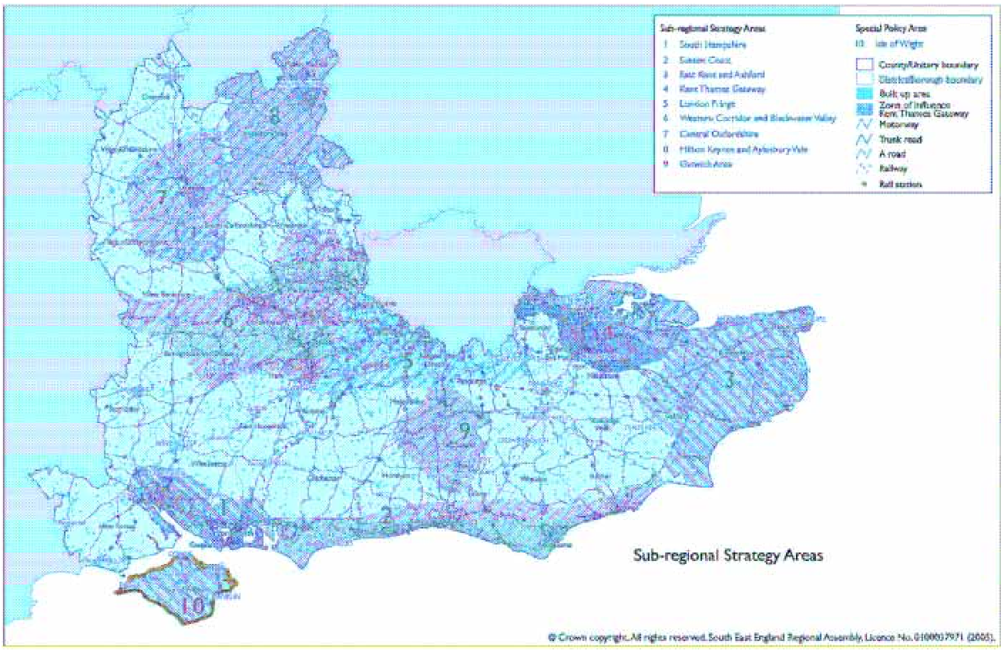
Policy RE8: In the Western Policy Area, positive strategies should be developed for areas where congestion or labour or land shortages are constraining economic growth. 'Hotspots' should be identified and specific policies developed to tackle local problems.

Draft South East Plan

The South East Plan, once adopted will be the formal regional spatial strategy for South East England. The Plan brings together policies for development and land use with other policies and programmes that influence the nature of places and people.

The Draft Plan has defined a set of nine sub-regions, which are presented in the map below.

Figure 3-1 Map of South East Plan Sub-regions



Source: Draft South East Plan Part 1: Core Regional Policies, South East of England Regional Assembly, 2005

Each sub-region has its own distinct issues and requirements that need to be addressed. Oxfordshire falls into the Rest of County Areas sub-region and parts of Cherwell make-up the Central Oxfordshire sub-region, number seven on the map above. The Plan has produced a Statement of Strategy for each sub-region, for Central Oxfordshire the strategy is:

'To capitalise on the unique potential of this world class university city, the sub-region's dynamic economy, which is seen as part of the Oxford-Cambridge Arc, while taking account of constraints to development posed by the Oxford Green Belt, the need to improve housing availability and affordability and the need to address pockets of deprivation in Oxford.'

More specific development policies with regards to employment and employment land are set out in **Policy CO5**, which states the main locations for the provision of employment land will be at Bicester and Didcot. Development is expected to cater for the needs of *'small business and innovation, skills development, business infrastructure and linkages to the knowledge based economy'.* **Policy RE2** encourages local authorities to promote regionally significant and locally important sectors and clusters as they evolve, making land and premises available for different sizes and types of businesses.

Policy RE3 addresses Local Development Documents and the importance of taking into account the employment needs of the local economy and workforce. It promotes the idea of using criteria based policies to provide a range of sites and premises drawing on the following:

- Locations that are accessible to the existing and proposed labour supply;
- Efficient use of existing and underused sites and premises;
- Locations which intensify the use of existing sites;
- Focus on urban areas;
- Promotion of mixed use development where appropriate and subject to replacement of land and premises lost to non-employment uses;
- Locations that promote the use of public transport.

One of the key features of the Central Oxfordshire Sub-region is noted as being the *'requirements for physical, social and economic infrastructure to address historic backlogs in provision and to provide for new economic and housing growth'*.

The Central Oxfordshire economy benefits from the universities, their spin offs, research campuses and publishing and the draft South East Plan highlights the importance of providing employment land for these activities to develop further. Bicester is cited as one of the towns capable of generating employment growth especially if proposed transport improvements are completed.

Bicester is considered to be included in the area of influence of the Oxford-Cambridge Arc and is well positioned to support a range of high value employment opportunities. The draft South East Plan suggests that a local economic and marketing strategy for Bicester be developed focusing on attracting inward investment and development.

The draft South East Plan sets out targets for the provision of new homes up to 2026 and Cherwell District's current annual target is 290 new homes or 5,800 in total by 2026 of which 4,300 are planned for Bicester.

Regional Economic Strategy For South East England

The current Regional Economic Strategy (RES) for the South East covers the period 2002 to 2012 but will be superseded by the RES for the period 2006-2016, scheduled for adoption in July 2006.

RES 2012 introduces the concept of smart growth. Smart growth is *'growth driven by productivity gains, not by resource intensive and low value added activity'*.

The RES sets out five objectives that will enable the region to meet the ultimate goal of smart growth. The five objectives are:

- Competitive businesses
- Successful people
- Vibrant communities
- Effective infrastructure
- Sustainable use of natural resources

Achieving the right mix of the above objectives will aid in achieving the development goals for the region and the RES sets out a strategy for implementing each of the five objectives.

The RES recognises that the South East of England comprises many diverse regions and that each region will be contribute a different mix of objectives. Cherwell District is included in the RES sub-region designated the Western Policy Area. The task for this sub-region is to *'build on existing economic strengths in order to achieve sustainable growth with minimum additional pressures on labour and land'.*

Oxfordshire Structure Plan 2016

In October 2005 Oxfordshire County Council adopted the new Oxfordshire Structure Plan 2016. The Plan provides a broad strategy for managing and facilitating development and the use of land in the County. The Plan was produced with the cooperation of the five councils of Cherwell, Oxford City, South Oxfordshire, Vale of White Horse and West Oxfordshire. This will be the last Structure Plan to be adopted by the County, as the South East Plan will replace it under the new planning system.

In Part one the Plan sets out the key objectives and overarching strategic development policies for the County, and Part two provides greater context to each policy and sets out how they should be implemented.

In Part one a key aim of the Council is to encourage the efficient use of land, energy and natural resources. The Council seeks to locate development where it can reduce the need to travel and encourage walking, cycling and the use of public transport. It is also important to the Council to support the growth of existing and emerging sectors and business clusters to provide employment opportunities for residents and space for local businesses to expand.

The Plan's general policy towards development is set out in **Policy G1**, which states:

'The general strategy is to provide a framework for development to sustain economic prosperity, meet housing and other requirements and guide the investment decisions of a range of organisations for the period to 2016 in ways that will:

A) Protect and enhance the environment, character and natural resources of the county by restraining the overall level of development;

B) Concentrate development in locations where;

i) A reasonable range of services and community facilities exist or can be provided; and

ii) The need to travel, particularly by private car, can be reduced and walking, cycling and the use of public transport can be encouraged;

C) *Make the best use of previously developed land and buildings within urban areas to reduce the need for the development of Greenfield sites, while not permitting development on important open spaces.'*

The larger urban areas will be the main focus for development and in rural areas development will be permitted to support the social and economic well being of local communities.

Part two of the Plan sets out more detailed planning policies which expand on the aims, objectives and general policies in Part One. Policies E2 and E3 are important to economic development and employment land.

Policy E2: *In the main towns of Banbury, Bicester, Didcot and Witney the provision of land for employment will be made:*

- *To achieve an appropriate balance between the number and type of jobs and the size and skills of the local workforce.*
- *To provide for the expansion and relocation of existing local firms and to accommodate firms, which need to be located in the area, including provision to support the development of science based industries or other important business clusters.*

Bicester is recognised as being in a good strategic location within the Oxford-Cambridge Arc to capitalise on the expanding knowledge and science based employment market.

It is suggested that local authorities should seek to restrict further expansion in the warehouse and distribution sector, particularly in Banbury and Bicester, as the sector uses a lot of land, generates a lot of heavy goods vehicle (HGV) traffic but employs relatively few people.

The Plan takes into account the emerging importance of small businesses within the County. The farming industry has experienced significant change over the last few years and the Plan seeks to provide local employment opportunities in rural areas through the conversion of former farm buildings, etc to accommodate a range of business types and sizes. With particular focus on small firms and employment diversity, **Policy E3** states that:

'Proposals for small scale premises (up to 500 sq m) including proposals that encourage farm and rural diversification will normally be permitted in appropriate locations.'

The Plan also puts pressure of land for housing by stating that:

'at least 55% of all new dwellings should be built on previously developed land within urban areas or through conversions of existing buildings'.

Employment generating development generally leads to an increased demand for housing. **Policy E5** states that when *'considering proposals for employment generating development which would generate a demand for housing, account will be taken of the existing or planned housing provision'.*

The Plan seeks to maintain a balance between employment-generating development and the capacity of the local housing market to absorb any new employment growth generated.

3.4. District Level

Adopted Cherwell Local Plan 1996

The adopted Cherwell Local Plan (adopted November 1996) remains part of the statutory Development Plan for Cherwell District. Its policies are 'saved' (i.e. they will continue to operate), except where deleted by the Local Development Scheme (LDS) or the Council's Annual Monitoring Report, until September 2007.

The adopted Cherwell Local Plan seeks the maintenance of a strong local economy and the creation of jobs to ensure full employment of the residents of the District. At the time the Plan was adopted, land allocations and schemes already granted planning permission were capable of generating between 11,200 and 22,560 new jobs while the workforce in the Banbury and Bicester travel to work area was predicted to increase by between 7,900 and 9,700.

Relevant saved employment policies include:

Policy EMP1: Employment generating development will be permitted on the sites shown on the proposals map, subject to the other relevant policies in the plan.

Policy EMP2: Employment generating development will be permitted on the land shown on the proposals map at Bicester Airfield.

Policy EMP3: Within the built-up limits of Kidlington, Yarnton and Begbroke (East) planning permission will normally be granted for employment-generating development provided that the proposal:

a) Represents a modest extension to an existing employment generating use; or
b) Is for new premises to be occupied in compliance with Structure Plan policy E3; or
c) Utilises a suitable existing building to provide accommodation for small businesses.

Policy EMP4: In the rural areas, proposals for employment generating development of the following types will normally be permitted:

i. Within an existing accepted employment site, including redevelopment; or
ii. Conversion of an existing or group of buildings; or

iii. Within, or adjoining settlements, for a minor extension to an existing acceptable employment site.

The Non-Statutory Cherwell Local Plan 2011

The Council was preparing a new local plan but on the 13th of December 2004 the Council decided to discontinue work on the plan and withdraw the draft plan from the statutory Local Plan process as there was no realistic prospect of it being adopted prior to Government changes to the planning system coming into force which would prevent its subsequent adoption. The Council is now preparing a Local Development Framework (LDF) under the new planning system. However, in order to avoid a policy void whilst the LDF is prepared, on 13th December 2004 the Council approved the Non-Statutory Cherwell Local Plan 2011 as interim planning policy for development control purposes.

The Non-Statutory Local Plan is made up of a Written Statement and the Proposals Map. The Written Statement describes the policies and proposals along with a more detailed justification for each. The Proposals Map illustrates the proposals included in the Written Statement, indicating sites for development and to which specific policies apply.

With respect to employment land and premises the Council aims to strike a balance between the number of jobs that are available and the size of the local workforce, while trying to minimise the need to travel and number of trips generated to each site. The Non-Statutory Local Plan reports that in the District's two main centres the working age population is projected to increase by 15% in Banbury and 21% in Bicester. A key aim of the Local Plan is to try to match, as best as possible, the number of jobs available to the increasing size of the workforce.

The Non-Statutory Local Plan sets out a number of site specific land use policies for Banbury, Bicester and Kidlington, highlighting the need to move away from large warehousing and distribution developments which have dominated in the past and move towards more B1 business development in order to achieve a more balanced employment structure.

More general policies regarding employment land and premises are set out in Policies EMP4 and EMP5.

EMP4 (Existing Employment Sites) states that proposals for employment-generating development on an existing site will be permitted provided that:

- *The proposal and any associated employment activities can be carried out without undue detriment to residential amenity, the highway network, village character, the appearance and character of the landscape and the environment (…).*
- *The proposal is for small firms (up to about 500 sq m) or for firms whose source of supply, commercial linkages, labour supply and markets make a specific location necessary for them.*

- *The proposal will not give rise to excessive or inappropriate traffic and will wherever possible contribute to the general aim of reducing the need to travel by private car.*

Policy EMP5 (Protecting Employment Sites) states that the change of use of an existing employment site will not be permitted unless:

- *There would be substantial and demonstrable planning benefit.*
- *The applicant demonstrates that every reasonable attempt has been made to secure suitable employment re-use.*

Overall, the Council seeks to ensure sustainable development in the District, which enhances the living and working environment of its residents. Development will be focused around high transport accessibility areas, with good public transport, pedestrian and bicycle links.

Local Development Framework 2026

Cherwell Council is in the early stages of preparing its Local Development Framework (LDF). In accordance with Section 15 of the Planning and Compulsory Purchase Act 2004, the Council has prepared a Local Development Scheme (LDS) that sets out the Council's project plan for the production of documents, plans and policies that are to be included in the LDF by 2008.

The LDF will be a portfolio of Development Plan Documents (DPDs) and Supplementary Planning Documents (SPDs). Cherwell Council is in the process of preparing the Core Strategies DPD, which will set the overarching spatial development strategy for the District. Other core components of the LDF will include a:

- Banbury and North Cherwell Site Allocations DPD
- Bicester and Central Oxford Site Allocations DPD
- Development Control Policies DPD
- Proposals Map

Cherwell Community Plan 2016

The Cherwell Community Plan sets out the long-term vision for the Cherwell District up to the year 2016 and provides the context for the Council's other strategies. The Plan works alongside the Oxfordshire Structure Plan which also covers the period up to 2016 and the Council's Local Development Framework (2026). The Plan was produced in the context of the Oxfordshire Structure Plan 2016 and is designed to work alongside that document and within the same timeframe. The Community Plan links the vision for communities within Cherwell to the physical changes that will be occurring in the District throughout this timeframe.

The Community Plan is structured around ten key themes that were developed through a series of public consultations and community workshops. These ten themes encompass the aspirations of the residents of Cherwell and the Community Plan sets out key actions that work towards achieving them. The Plan is undergoing a revision, and the extracts below are from the consultation draft.

The employment vision for the District is to achieve *'a diverse, skilled, high-wage, high-employment economy with a strong high-tech sector, good transport links, and sound infrastructure'*. Key aims for achieving this vision are to:

- Sustain high levels of employment and economic activity;
- Promote a diverse, sustainable economy to help "recession-proof" Cherwell and maintain a high quality of life well into the future;
- The creation and maintenance of the business infrastructure required to support a sustainable economy;
- Ensure the supply of skills and experience meets the needs of employers;
- Ensure good access to quality employment across the District;
- Maintain excellent connections, both physical and virtual, to surrounding economies and markets.

The vision and aims seek to ensure a diverse and vibrant economy that will provide Cherwell residents with employment opportunities and Cherwell employers with growth opportunities.

Economic Development Strategy 2006-2011

The Economic Development Strategy for Cherwell District was developed in the light of the Community Plan and sets out delivery strategies to achieve the key economic objectives of the Community Plan. The Strategy works to foster a business and employment friendly environment, making Cherwell an inviting location for businesses in that they will have access to a local skilled workforce, good transport links and supporting infrastructure. The Economic Development Strategy will help to achieve a number of key aims in the Community Plan, by having a number of delivery themes. Those that relate most strongly to the identification of an appropriate supply of employment land is:

- Property and premises
- Communications infrastructure
- Creating employment
- Business start-up
- Inward investment
- Access to employment
- Rural economy

4. SOCIO-ECONOMIC STRUCTURE

4.1. Introduction

It is helpful to consider current demand and future provision of employment land in the context of the socio-economic structure of the area. Creating sustainable communities includes providing for employment suitable to the local workforce. Therefore this section analyses the socio-economic structure of Cherwell and, where applicable, makes some comparisons with the rest of Oxfordshire, the South East and the rest of Great Britain. Where possible we have tried to make relevant comparisons between Banbury and Bicester since they are the main focus for employment generating activity in the District.

4.2. Population

Over the last decade Cherwell District has experienced population growth above the national average. In 1994 the population was 124,400 and had increased by 6.8% to 133,500 in 2004. The District experienced similar growth as Oxfordshire County (6.4%) and increased at a greater rate than the South East (4.9%). The population of Cherwell makes up about 21.5% of Oxfordshire's population and experienced the second largest increase in population in the County next to Oxford City.

Approximately 52.7% of Cherwell's population reside in the District's two main towns of Banbury and Bicester, with around 42,000 and 30,000 residents respectively

Cherwell's population is 50.4% female and 49.5% male and the average age is 37.3 years. Over 18.9% of the population is over retirement age and 55.7% of the population is between 20 and 59 years old.

Cherwell residents tend to be married (approximately 45.4%) and 74.5% live in owner occupied dwellings, which is consistent with the rest of the South East. Housing tenure in Cherwell is similar to that of the South East with 13.0% of residents living in Council managed housing or housing managed by a Registered Social Landlord. In 2001 there were 53,225 households in Cherwell and the average household size was 2.4 people. Table 4-1 below summarises the population characteristics of Cherwell.

Table 4-1 Summary of Population Characteristics

% of population

	Cherwell	South East	Great Britain
Age Groups			
0-19	25.4	24.6	24.60
20-59	55.7	53.8	54.26
60-74	12.2	13.5	13.50
75+	6.7	8.1	7.64
Married	45.4	44.3%	49.2
Tenure			
Owner Occupied	74.5	73.2	68.2
Council or RSL	13.0	14.0	19.2
Private Rented	12.1	12.1	11.9
Occupational Group			
AB	25.1	26.4	22.0
C1	31.2	32.1	29.7

Source: Census 2001

4.3. Skills and Training

Cherwell's working age residents are relatively highly skilled with similar characteristics to the workforce of the South East. In Cherwell 29.3% of the workforce is educated to a degree level or higher (NVQ4[3]) and almost half the workforce have obtained their A levels (NVQ3). Table 4-2 provides a breakdown of the skills and training of Cherwell's workforce in comparison to the South East and Great Britain.

Table 4-2 Qualifications

Qualification Level	Cherwell (numbers)	Cherwell (%)	South East (%)	GB (%)
NVQ4 and above	24,400	29.3	28.5	25.2
NVQ3 and above	39,700	47.6	46.9	43.1
NVQ2 and above	52,200	62.5	66.0	61.5
NVQ1 and above	68,300	81.8	81.1	76.0
Other qualifications	5,600	6.7	8.0	8.8
No qualifications	9,300	11.2	10.8	15.1

Source: local area labour force survey (Mar 2003 – Feb 2004)

[3] NVQ: National Vocational Qualification
NVQ1: fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ1, intermediate 1 national qualification (Scotland) or equivalent
NVQ2: 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ2, intermediate 2 national qualification (Scotland) or equivalent
NVQ3: 2 or more A levels, advanced GNVQ, NVQ 3, 2 or more higher or advanced higher national qualifications (Scotland) or equivalent
NVQ4: HND, degree and higher degree level qualifications or equivalent.

4.4. Workforce

In 2004, 63% (84,000) of Cherwell's population were of working age and 86% of those people were economically active. This is in line with the economic activity rate for the South East (82%) and slightly above that of Great Britain (78%). Of economically active people 71,900 were in employment and 1,600 were unemployed.

Table 4-3 Economic Activity

	Cherwell (numbers)	Cherwell (%)	South East (%)	GB (%)
Economically Active	73,500	86.4	82.1	78.3
In Employment	71,900	84.5	79.1	74.5
Employees	65,100	76.5	67.9	65.0
Self Employed	6,800	8.0	10.6	9.1
Unemployed*	1,600	2.2	3.7	4.8

Source: Annual Population Survey (Apr 2004-Mar 2005)
**Percentages are based on working age population, except unemployed which is based on economically active*

Cherwell's workforce is employed in a range of occupations with 36% of people being employed in managerial, professional and associate professional occupations. Table 4-4 below provides more detail.

Table 4-4 Employment by Occupation

Occupation	Cherwell (numbers)	Cherwell (%)	South East (%)	GB (%)
Managers and senior officials	11,200	14.8	16.8	14.9
Professional occupations	9,200	12.3	13.9	12.6
Associate professional & technical	6,600	8.7	14.9	14.1
Administrative and secretarial	14,900	19.7	13.2	12.6
Skilled trades occupations	8,200	10.9	10.8	11.3
Personal service occupations	5,300	7.0	7.9	7.7
Sales and customer service	6,200	8.4	7.4	7.8
Process plant & machine operatives	5,900	7.8	5.3	7.5
Elementary occupations	7,900	10.4	9.8	11.5
Total	**75,400**	**100.0**	**100.0**	**100.0**

Source: Annual Population Survey (Apr 2004 – Mar 2005)

There is a similar distribution of occupations in Banbury and Bicester to that of the whole District, though there is a slightly higher concentration of people being employed in managerial, professional and associate professional positions. Bicester has a particularly high amount of people employed in higher-level positions (43.7%), which is likely due to its proximity to Oxford. Table 4-5 below compares the occupational distribution of Banbury and Bicester residents.

Table 4-5 Employment by Occupation in Banbury and Bicester

	Banbury (number)	Banbury (%)	Bicester (number)	Bicester (%)
Managers and senior officials	2,683	12.7	2,999	18.5
Professional occupations	1,652	7.8	1,499	9.3
Associate professional & technical	2,418	11.4	2,573	15.9
Administrative and secretarial	2,663	12.6	2,315	14.3
Skilled trades occupations	2,446	11.6	1,671	10.3
Personal service occupations	1,363	6.5	918	5.7
Sales and customer service	2,047	9.7	1,170	7.2
Process plant & machine operatives	2,711	12.8	1,235	7.6
Elementary occupations	3,138	14.9	1,814	11.2
Total	**21,121**	**100.0**	**16,194**	**100.0**

Source: ONS, Labour Profile for Wards in Cherwell, 2005

4.5. Unemployment

In 2004 the unemployment rate[4] in Cherwell was 2.0% (700 people), which is lower than that of the South East (3.5%) and Great Britain (4.4%). As of October 2005 there were 758 Jobseeker's Allowance (JSA) claimants (0.9% of the working age population). Unemployment in Banbury and Bicester is lower (0.63% and 0.9% respectively) than that of the District indicating that unemployment tends to be concentrated in Cherwell's more rural areas.

There are 11,500 (13.6%) people considered to be economically inactive in Cherwell and 76% of those are considered not to want a job. These figures are lower in comparison to the South East where economic inactivity is reported for 17.9% of the working age population.

[4] The number of unemployed working aged people expressed as a percentage of the economically active working aged population.

4.6. Earnings by Residents

The average gross weekly earnings for Cherwell residents are £449, which is slightly below that of the South East (£465) but above Great Britain (£423). Table 4-6 below summarises average weekly earnings in Cherwell, the South East and Great Britain. However, figures need to be treated with care, as the reliability of statistics at a district level is limited due to a small sample size.

Table 4-6 Average Gross Weekly Earnings

Borough/Region	Average Gross Weekly Earnings
Cherwell	£449
South East	£465
Great Britain	£423

Source: Annual Survey of Hours and Earnings, 2004

4.7. Travel to Work

There are 71,900 Cherwell residents currently in employment, of which approximately 64%[5] work within Cherwell. The latest data on travel to work patterns is provided through origin-destination statistics collated from Census 2001. While the total figures for employment are slightly below current figures provided in the updated Annual Population Survey, the Census figures give a good indication of the inflow and outflow of residents and workers into and out of Cherwell and the pattern is unlikely to have significantly changed.

Table 4-7 below summarises travel to work movements of Cherwell residents and employees working in Cherwell.

The most travelled to place Cherwell residents go for work outside of Cherwell is Oxford City. According to the Census 2001, almost 9,100 Cherwell residents travelled to Oxford for employment, accounting for 13% of employed people.

[5] Based on Origin-Destination Statistics for local authorities, 2001 Census

Table 4-7 Travel to Work Patterns

	Where do people who live in Cherwell work?		Where do people who work in Cherwell live?	
	Total	**%**	**Total**	**%**
Cherwell	**45,325**	**64.5%**	**45,325**	**69.4%**
South Oxfordshire	1,182	1.7%	859	1.3%
Oxford City	9,095	12.9%	1,850	2.8%
West Oxfordshire	2,214	3.1%	3,013	4.6%
Vale of Whitehorse	1,643	2.3%	1,197	1.8%
Oxfordshire County	**59,459**	**84.6%**	**52,244**	**80.0%**
London	1,594	2.3%	254	0.4%
Birmingham	213	0.3%	133	0.2%
Aylesbury Vale	1,251	1.8%	1,679	2.6%
Other	7,787	11.1%	10,963	16.8%
Total	**70,304**	**100.0%**	**65,273**	**100.0%**

Source: Origin Destination Statistics for Local Authorities, Census 2001
* Numbers do not match total employment figures set out in Section 5.2 due to separate data sources. However this does provide a good indication of the current movements of Harrow's population and employees.

4.8. Summary

Cherwell District is continuing to draw new residents attracted by the area's high standard of living and good quality of life. The District has the advantage of a highly skilled workforce and residents tend to be employed in professional or semi-professional occupations.

The District's accessibility to major centres such as London, Birmingham and Oxford City has had an influence on the level of daily out commuting by residents to take advantage of job opportunities elsewhere. To address this issue the District is looking to attract more high-tech and knowledge based industries to the area in order to match more closely with the skills of the existing population. The premises required by these types of businesses will impact on the amount and characteristics of land required for future development. This study will take these factors into account particularly during the employment site appraisals and in the development of the final recommendations.

5. LOCAL ECONOMY AND BUSINESS

5.1. Introduction

This section provides a profile of the prevailing economic and employment conditions in Cherwell District. It provides the economic context to employment land demand and supply factors, providing an overview of trends and emerging growth sectors in the area.

We have analysed employment and business sectors in Cherwell using a number of sources including the Annual Population Survey, the Local Area Labour Force Survey, Annual Business Inquiry, ONS VAT registrations and de-registrations.

5.2. Employment

Since 1995 Cherwell has experienced a gradual growth in employee jobs. The number of people employed in the District has increased from 51,106 in 1995 to 71,088 in 2004, an increase of 39%.

Employment in the business services sector saw the largest percentage increase in employee numbers increasing 272%, from 4,610 employees in 1995 to 17,148 in 2004. Employment in the primary and utilities sector also saw a large percentage increase in employment however this sector accounts for a small proportion of overall employment in the District and continued future growth is not expected. The manufacturing sector and the financial services sector each recorded a decline in employment figures of 24% and 17% respectively. Table 5-1 below summarises the changes in Cherwell employee numbers by sector[6] between 1995[7] and 2004.

[6] Some Industry Sectors have been amalgamated in some instances for confidentiality purposes.
[7] The ABI was introduced in 1998 to replace the Annual Employment Survey (AES). Annual datasets were revised back to 1995 to mitigate the discrepancies in the results due to contributor reporting problems more prevalent to the AES. However, there could still be some underreporting of jobs prior to 1998 resulting in a slightly skewed increase to 1998 and then levelling out again. Regardless, the ABI analysis still provides a good indication of employment activity in the District. Please see ABI Article 10/04/01, The Launch of the Annual Business Inquiry.

Table 5-1 Employment by Industry Sector

Sector	1995	2000	2004	Change (1995-2004)	
				Number	%
Primary and utilities	505	1,312	1,036	531	105.1%
Manufacturing	14,753	14,196	11,209	-3,544	-24.0%
Construction	2,118	2,840	2,909	791	37.3%
Wholesale	4,938	5,975	5,709	771	15.6%
Retail	5,584	8,031	7,983	2,399	43.0%
Hotels and restaurants	2,372	3,581	4,310	1,938	81.7%
Transport and communication	2,232	2,669	3,131	899	40.3%
Financial services	1,237	1,164	1,022	-215	-17.4%
Business services	4,610	13,004	17,148	12,538	272.0%
Public administration	3,479	4,321	5,337	1,858	53.4%
Health and education	7,297	7,339	8,584	1,287	17.6%
Other services	1,981	3,216	2,710	729	36.8%
Total	**51,106**	**67,648**	**71,088**	**19,982**	**39.1%**

Source: ONS, Annual Business Inquiry 1995-2004

5.3. Businesses and Sectors

As would be expected with an increase in employee numbers in the District, one would also expect an increase in the number of places to work. As a first indication of business growth in the District we have used the ONS data on VAT registered businesses.

The number of VAT registered businesses in Cherwell has increased from 4,150 in 1995 to 5,110 in 2004, an increase of almost 19%. The largest percentage increase was seen in the business services sector (42%), followed by the transport and communication sector (22%).

Table 5-2 below sets out the change in the number of businesses throughout the District between 1995 and 2004. Whilst not providing the same sector categories as the ABI data used in Section 5.2 above the information presented on VAT registered business provides a good indication of the increase in business activity in the District.

Table 5-2 VAT Registered Business by Industry Sector

VAT Registration Industrial Categories	1995	1998	2001	2004	(Change 1995-2004)	
					No	%
Agriculture and Energy	510	465	435	430	-80	-18.6
Manufacturing	390	415	435	415	25	6.0
Construction	575	580	585	665	90	13.5
Wholesale, retail and trade	855	850	870	900	45	5.0
Hotels and restaurants	250	240	275	300	50	16.7
Transport and communication	125	130	140	160	35	21.9
Business Services	980	1,220	1,480	1,675	695	41.5
Public Services	465	505	560	565	100	17.7
Total	**4,150**	**4,405**	**4,780**	**5,110**	**960**	**18.8**

Source: ONS, VAT registrations/de-registrations

Another good indication of business growth in the District is the data provided through the Annual Business Inquiry (ABI). While this data does not relate exactly to the number of businesses operating in the District it does give a good indication of the range of different business activities being undertaken there. The ABI collects data on a 'data unit' level. Data units are 'roughly equivalent to workplaces but because of the way the data are collected two or more units can be present in the same workplace' and 'a single workplace can be counted as two data units where there are two distinct business activities at the same site'[8].

Between 1995 and 2004 the number of data units in Cherwell increased from 5,079 to 6,138 in total. This information is useful in that it shows an element of business diversification in Cherwell where the number of VAT registered business was 5,110 in 2004 but the number of different business activities being undertaken by those businesses equalled 6,138. Table 5-3 below provides more information on the change in the number of data units by sector in Cherwell.

[8] ONS, ABI definition of Data units

Table 5-3 Data Units per Industry Sector

Industry Sector	1995	2000	2004	Change (1995-2004)	
				number	%
Primary and utilities	207	139	39	-168	-81.2
Manufacturing	494	513	484	-10	-2.0
Construction	609	591	674	65	10.7
Wholesale	546	569	585	39	7.1
Retail	591	648	697	106	17.9
Hotels and restaurants	319	347	437	118	37.0
Transport and communication	199	212	237	38	19.1
Financial services	96	93	88	-8	-8.3
Business services	1,114	1,526	1,885	771	69.2
Public administration	74	76	79	5	6.8
Health and education	313	336	370	57	18.2
Other services	517	574	563	46	8.9
Total	**5,079**	**5,624**	**6,138**	**1,059**	**20.9**

Source: ONS, ABI 1995-2004

5.4. Business Size

The data unit analyses presented above also provides a breakdown of business activity by business size. While the size analysis provides a useful indication of the make-up of firms operating in Cherwell, the size bands used refer to the number of employees at each data unit, not the size of the parent company.

However, bearing in mind the above caveats, small companies in Cherwell appear to be a very important element of the business community. In 2004 there were 5,127 data units (business activities) employing between one and ten employees, which accounts for 84% business activities in the District. Table 5-4 highlights the continuing importance of small businesses to Cherwell's economy.

Table 5-4 Data Units by Size Band

	1995		2000		2004	
Size Band	Number	% of total	Number	% of total	Number	% of total
1 to 10	4,347	85.6	4,688	83.4	5,127	83.5
11 to 49	570	11.2	726	12.9	800	13.0
50 to 199	130	2.6	166	3.0	172	2.8
200 or more	32	0.6	44	0.8	39	0.6
Total	**5,079**	**100.0**	**5,624**	**100.0**	**6,138**	**100.0**

Source:ONS, ABI 1995-2004

Table 5-5 below provides the industrial breakdown of Cherwell businesses by size band at 2004. The business services sector has a number of firms of all sizes with eight firms employing more than 200 people. The majority of businesses tend to have between one and ten employees however a number of large manufacturing firms remain in the District.

Table 5-5 Industry Units by Employee Size Band

Industry Sector	1 to 10	11 to 49	50 to 199	200 +
Primary and utilities	30	5	3	1
Manufacturing	364	75	34	11
Construction	625	41	7	1
Wholesale	481	86	16	2
Retail	574	98	20	5
Hotels and restaurants	335	91	11	0
Transport and communication	187	34	15	1
Financial services	60	26	1	1
Business services	1,722	136	19	8
Public administration	41	20	11	7
Health and education	195	142	31	2
Other services	513	46	4	0
Total	**5,127**	**800**	**172**	**39**

Source: ONS, ABI 2004

5.5. Location Quotient and Sector Change

The location quotient is a measure of how strongly different industries are represented in the local economy compared to the wider region. For the purpose of this study we have compared the proportion of employees in the different industrial sectors in Cherwell District with the proportion of employees in the same sectors in the South East. This will provide some insight into the types of businesses located in Cherwell that may have a potential advantage for operating there.

A location quotient larger than one implies that there are proportionally more employees in this sector in Cherwell than would be expected in comparison to the South East. A location quotient smaller than one indicates that this sector is under-represented in the study area in comparison to the larger region. Table 5-6 provides a summary of the proportion of employment in each sector in Cherwell and the South East; and the related location quotients for each sector.

Table 5-6 Cherwell : South East Location Quotient

Industry Sector	Cherwell		South East		Location Quotient
	Number	% of total	Number	% of total	
Primary and utilities	1,036	1.5	32,160	0.9	1.6
Manufacturing	11,209	15.8	343,369	9.5	1.7
Construction	2,909	4.1	150,028	4.1	1.0
Wholesale	5,709	8.0	265,938	7.4	1.1
Retail	7,983	11.2	437,285	12.1	0.9
Hotels and restaurants	4,310	6.1	255,765	7.1	0.9
Transport and communication	3,131	4.4	211,770	5.9	0.8
Financial services	1,022	1.4	128,337	3.5	0.4
Business services	17,148	24.1	718,599	19.9	1.2
Public administration	5,337	7.5	156,672	4.3	1.7
Health and education	8,584	12.1	735,609	20.3	0.6
Other services	2,710	3.8	181,486	5.0	0.8
Total	**71,088**	**100.0**	**3,617,019**	**100.0**	**1.0**

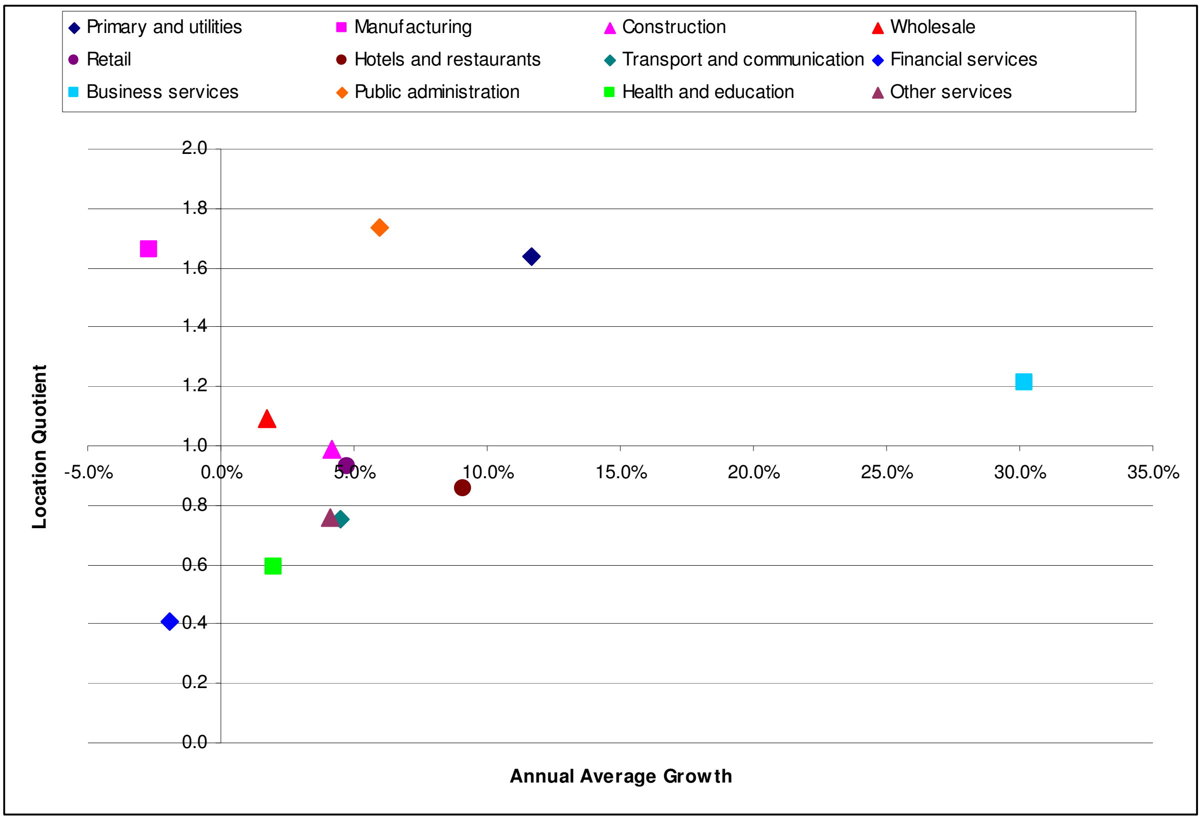
Source: ONS, ABI 2004

Based on this analysis the following sectors appear to have proportionally more employees in Cherwell than would be expected in comparison to the proportion of employees in the South East:

- Primary and utilities
- Manufacturing
- Wholesale
- Business services
- Public administration

Plotting the location quotient against the average annual rate of change for each sector identifies those sectors that are growing that could have a potential advantage for operating in Cherwell. These are the sectors in the top right quadrant of Figure 5-1. Manufacturing shows a strong locational preference even though the sector has been declining in Cherwell. The construction sector has a neutral location quotient even though it has been experiencing employment growth in the District. Business services and public administration both have a relatively strong location quotient coupled with strong growth over the last decade. The primary and utilities sector has a strong location quotient but still accounts for a relatively small proportion of employment in the District and growth in unlikely to continue into the future.

Figure 5-1 Location Quotient Cherwell District: South East against Sector Change in Cherwell 1995-2004



Source: ONS, ABI 1995 – 2004, URS Calculations

5.6. Summary

Cherwell's economy appears to be in a period of transition. The strong manufacturing sector, while still a major employer in the District, has experienced recent declines in employee numbers, likely as a result of technological innovation and the use of less labour intensive processes but also due a general decline in manufacturing nationally.

The Districts excellent road and rail links have helped to bolster the transport sector and the business services has seen a substantial growth in both employee numbers and VAT registered businesses. While the manufacturing and transport sectors are an important source of investment in the District they predominantly take up large amounts of land with warehouses and factories but provide comparatively few employment opportunities.

The Council's development objectives seek to promote more office and small-scale industrial unit development (B1/B2 class use), which could capitalise on the recent growth of the business services sector. This strategy would likely impact the amount of and the location of land required for development related to B1/B2 class use. These factors will be taken into account throughout this study in consideration of employment land issues throughout the District.

6. QUALITY AND CHARACTERISTICS OF EMPLOYMENT LAND

6.1. Introduction

This section provides some information on the amount of commercial floorspace on record in the District and then sets out the key findings of the field survey. Results are summarised to provide an overview of conditions of employment clusters and individual vacant and derelict development sites. The full survey findings and all data entries are presented as **Appendix D** on a cluster-by-cluster basis.

6.2. Employment Land

The field survey team visited and assessed 37 employment clusters throughout Cherwell District. The 37 employment clusters included approximately 428 hectares of land[9] and a wide range of premises. A map of each employment cluster with associated potential development sites is included in **Appendix B.**

6.3. Employment Floorspace

The VOA provides summary information on the amount of floorspace and number of hereditaments[10] by type. The latest data is provided for 2005 and is set out in Table 6-1. There is a total of just over 1.4 million sq m of commercial floorspace in the District of which 42% is made of factory floorspace and 42% is made up of warehouse space. Office floorspace accounts for only 15.6%.

Table 6-1 Employment Floorspace and Number of Hereditaments

	Floorspace (sq m)	% of total	Hereditaments (Number)	Average Floorspace (sq m)
Office	221,000	15.6%	853	259
Factory	602,000	42.5%	668	901
Warehouse	595,000	42.0%	528	1,127
Total	**1,418,000**	**100.0%**	**2,049**	**692**

Source: VOA, 2005

The VOA office also provides data on the age of commercial floorspace in each local authority. Data on the age of floorspace stock is provided up to 2003 and reveals that over 50% of the commercial floorspace stock in Cherwell was built prior to 1970 and 25% before 1940. Office and factory floorspace makes up some of the oldest floorspace in the District, with 55% of office floorspace and 62% of factory floorspace built prior to 1970.

[9] URS' GIS technician has calculated the total stock of surveyed employment land through GIS, based on results of the survey and associated mapping exercise.
[10] Statistical unit used to count the number of individual properties in each use for the purpose of determining rateable values for the VOA.

Warehousing space is relatively new with 33% built between 1991 and 2000. Table 6-2 provides more detail of the age of the commercial floorspace stock in Cherwell.

Table 6-2 Age of Commercial Floorspace Stock

	Office		Factory		Warehouse		All Types	
	sq m ('000s)	% of total	sq m ('000s)	% of total	sq m ('000s)	% of total	Sq m ('000s)	% of total
Pre 1940	60	34.9	268	35.7	13	3.1	341	25.5
1940-70	33	19.2	196	26.1	112	27.1	341	25.5
1971-80	19	11.0	118	15.7	101	24.5	238	17.8
1981-90	29	16.9	138	18.4	52	12.6	219	16.4
1991-2000	31	18.0	31	4.1	135	32.7	197	14.7
2001-2003	*	*	*	*	*	*	*	*
Total	**172**	**100**	**751**	**100**	**413**	**100**	**1,336**	**100.0**

Source: VOA, Total floorspace by LAD and age for each bulk class, 2003

6.4. Employment Clusters and Condition

Employment Clusters in Good Condition

Many of the surveyed employment clusters were in good condition and nine clusters were recorded to be in very good condition. To receive this designation clusters had to fulfil the following criteria:

Very Good or Good Building Condition

Very good – buildings in immaculate state, no signs of paint coming off, windows and window frames in very good condition, immediate surrounding and grounds well kept.

Good – buildings in good condition, small areas where paint might come off, grounds in reasonable state.

Very Good or Good Quality of Environment

Very good – the quality of the streets and the public realm within the business cluster are of very good quality (no potholes, no litter, no uncollected rubbish, well maintained street furniture). There is enough street lighting and no perceived safety issues. The business cluster is not polluted by noise or air pollution from neighbouring uses and or heavy street traffic.

Good – the quality of the streets and the public realm within and surrounding the business cluster are of good quality. Nothing in the local environment seems disturbing but it does not reach the 'very good' standard (some litter, street furniture shows signs of age, etc). There are no perceived safety issues.

Very Good or Good Strategic Road Access

Very good – main entrance to business cluster is within 500m of a motorway junction.

Good – the business cluster is within a five-minute drive to the motorway junction on an A-road.

Other positive characteristics included:

- Parking and servicing
- Internal road access
- Access to facilities and amenities
- Access to public transport

Table 6-3 Employment Clusters in Good or Very Good Condition

No	Name / Location	Area (ha)
BA1	Banbury Cross Business Park, Banbury	48.7
BA2	Land North of Overthorpe Road, Banbury	22.8
BA7	Marley Industrial Estate, Banbury	16.6
BA8	KRAFT, Banbury	13.9
BA9	Banbury Cross Retail Park, Banbury	9.9
BA10	Beaumont Industrial Estate, Banbury	34.4
BA13	Hella, Banbury	8.2
B1	Bicester Park, Bicester	15.6
B2	Telford Road, Bicester	15.4
B3	Chaucer Business Park, Bicester	12.2
B4	Murdoch Road, Bicester	13.1
B5	Wedgewood Road, Bicester	4.8
B10	Station Approach, Bicester	10.9
K2	Station Field Industrial Park, Kidlington	8.3
K3	West side of Canal, Kidlington	11.8
K4	Motor Park, Kidlington	4.8
K5	Oxford Spires, Kidlington	6.0
K6	Yarnton Business Park (Oxford Business Park)	6.3
K7	Begbroke Science Park	4.8
R5	PA Turney Site	3.2
R6	Wykham Mill	5.4
	Total	**277.1**

Source: URS Cherwell Employment Land Survey, 2005

Employment Clusters in Poor or Very Poor Condition

Of the 37 surveyed business clusters six were recorded to be in poor or very poor condition. Factors influencing this designation include:

Poor or Very Poor Building Condition

Poor – paint coming off, some cracks, windows in a poor state, surroundings are poorly kept.

Very Poor – building still in use but in very poor condition; paint coming off in large areas, some windows broken, surroundings not maintained and/or littered and/or cluttered with rubbish.

Poor or Very Poor Quality of Environment

Poor – the streets and the public realm within and surrounding the business area are of poor quality (some potholes, some litter, poorly maintained or damaged street furniture). There is not enough street lighting and some perceived safety issues. The business area might be polluted by some noise or air pollution from neighbouring uses and/or heavy street traffic.

Very Poor – the streets and the public realm within and surrounding the business area are of very poor quality (potholes, litter on street, not collected rubbish, etc.). There is not enough street lighting and there are perceived safety issues. There is noise and/or air pollution from neighbouring uses and/or heavy street traffic.

Poor or Very Poor Strategic Road Access

Poor – business cluster is located further than a five-minute drive from a motorway junction but still on an A-road.

Very Poor – business cluster is located on an indirect route to a motorway junction and is not located on a main road.

Other factors include:

- Inadequate servicing
- Limited parking facilities
- Bad neighbour uses

There were a total of six clusters recorded in poor or very poor condition, representing 12.5% of all employment land. Table 6-4 below summarises the employment clusters that were in poor or very poor condition.

Table 6-4 Employment Clusters in Poor or Very Poor Condition

No	Name / Location	Area (ha)
BA4	Thorpe Park, Banbury	28.5
BA11	Alcan, Banbury	6.4
BA12	Alcoa, Banbury	12.6
K1	Cherwell Business Park, Kidlington	5.3
R1	Twyford Mill, Adderbury	-
R3	Brymbo Works, Hook Norton	0.7
	Total	**53.5**

Source: URS Cherwell Employment Land Survey, 2005

6.5. Vacant and Developable Land

The field survey team surveyed all vacant sites including those with empty buildings in either good or poor condition. Vacant land included empty or derelict sites where land was considered underutilised and where the economic development/employment potential of the site is not being fully realised.

The surveyors found that many of the development sites identified in the Non-Statutory Local Plan, particularly those within operating industrial areas, had been taken up and developed. Table 6-5 lists the development sites identified in the survey that are designated employment development sites in the Non-Statutory Local Plan. Some sites were part of larger designated sites that had since been partially developed.

Table 6-5 Non-Statutory Local Plan Vacant Development Sites

No	Name / Location	Area (ha)
BA3	Land South of Overthorpe Road, Banbury	21.0
B7	Gavray Drive, Bicester	14.7
B9	Oxford Road, Bicester	16
B6	Launton Road, Bicester	3.4
B8	Bicester Airfield, Bicester	3.5[11]
B1.1	Bicester Park	0.8[12]
BA14	West of Hardwick Farm, Banbury	0.7
BA1.2	Banbury Cross Business Park	2.5
BA1.1	Banbury Cross Business Park	3.3
BA7.1	Marley Industrial Estate	0.5
BA1.4	Banbury Cross Business Park	1.0
K5.1	Oxford Spires	0.9
R4	Banbury Business Park	3.6
R3	Brymbo Works Ironworks	0.7
R5	PA Turneys Weston on the Green	1.9
	Total	**74.5**

Source: URS Cherwell Employment Land Survey, 2005

A number of clusters were identified through the survey as having some vacant and/or derelict sites which could be utilised better or redeveloped. These sites included pockets of vacant and overgrown land, large expanses of car parks that were no longer being used or sites with rundown and/or empty buildings. Table 6-6 below lists clusters with developable sites and the area within each cluster that could be made available for development or redevelopment.

[11] See Section 8 for determination of available developable area at Bicester Airfield.
[12] Last remaining site in Bicester Park, which was picked up through Vial Williams market research.

Table 6-6 Identified Development Sites in Existing Business Clusters

No	Name / Location	Area (ha)
BA1.3	Banbury Cross Business Park	1.0
BA2	Land North of Overthorpe Road	5.8
BA12	Alcoa Site	0.9
BA11	Alcan Site	10.6
BA10.1	Beaumont Industrial Estate	0.6
BA10.2	Beaumont Industrial Estate	0.1
BA7.2	Marley Industrial Estate	0.01
K3.1	West Side of Canal	0.6
K3.2	West Side of Canal	0.8
K5.2	Oxford Spires	0.4
K4.1	Motor Park	0.5
	Total	**21.3**

Source: URS Cherwell Employment Land Survey, 2005

6.6. Vacant Buildings and Developable Land Actively Marketed

In line with the ODPM's 2004 guidance on Employment Land Reviews, the surveyors assessed the market attractiveness of sites noting whether there were any signs of building, renovations or infrastructure changes to the site occurring in the last five years. In addition, they noted any evidence of active marketing of employment sites, including whether there were estate agent's signs or other advertisements for the land for rent or for sale as use for employment purposes.

Table 6-7 below list those clusters that were being actively marketed as well as the manner in which they were being marketed.

Table 6-7 Active Marketing

No	Name / Location	Evidence of Marketing
BA4	Thorpe Park	• White Commercial (Tel: 01295 271000) - 2,198 sq.m of industrial/commercial space - 123 sq.m of industrial/commercial space • Bankier Sloan (Tel: 01869 338866) - 140 sq m of industrial/commercial space • Berry Morris (Tel: 01295 273555) - 218 sq m of industrial / commercial space
BA7	Marley Industrial Estate	• White Commercial (Tel. 01295 271000) - 418 sq m and 518 sq m business units to let.
BA10	Beaumont Industrial Estate	• Berry Morris (Tel: 01869 338866) - 2 x 46 sq m units - 413 sq m industrial unit and yard (next to another derelict building) • White Commercial (Tel: 01295 271000) - 485 sq m to 1045 sq m commercial/industrial space
BA1	Banbury Cross Business Park	• White Commercial (Tel. 01295 271000) - 2,010 sq m warehouse/industrial space • Berry Morris (Tel: 01295 273555) - 218 sq m, 612 sq m, 200 sq m, 414 sq m industrial/commercial space for lease. - White Commercial (Tel: 01295 271000) - Corner building upon entry into site
BA11	Alcan, Banbury	• White Commercial (Tel: 01295 271000) - For sale/let 12,000 sq m mixed commercial opportunities

No	Name / Location	Evidence of Marketing
B2	Telford Road	• Lambert Smith Hampton (Tel: 01865 20244) - 255 sq m industrial/business unit - 467 sq m modern industrial unit • VSL (Tel: 01865 848 488) • 443 sq m commercial industrial site - 3,577 sq m production facility • Berry Morris (Tel: 01295 273555) - One commercial/industrial unit • Atchison Raffety (Tel: 01865 865 658) - 2,581 sq m warehouse/industrial unit - 260 sq m production/warehouse
R6	Wykham Mill	• Berry Morris (Tel: 01295 273555) - 2,800 sq m Industrial Premises
R1	Twyford Mill	• Berry Morris (Tel: 02195 273555) - 227 sq m industrial commercial space
R4	Banbury Business Park, Adderbury	• Lambert Smith Hampton (Tel: 01865 200244) - 230 - 4,645sq m office space available
B4	Murdoch Road	• VSL (Tel: 01865 848 488) - 232 sq m industrial/commercial to let - Royal Mail units to let 1,160 sq m • Lambert Smith Hampton (Tel: 01865 200244) - For sale detached industrial unit 1,300 sq m
B6	Launton Road	• Lambert Smith Hampton (Tel: 01865 200244) - 7,292 sq m industrial facilities.
K1	Cherwell Business Park, Kidlington	• Thomas Merrifield (Tel: 01865 861700) - 2 office units for rent • VSL (Tel: 01865 848 488) - 226 sq m to 453 sq m industrial unit
K2	Station Field Industrial Park	• VSL (Tel: 01865 848 488) and Lambert Smith Hampton (Tel: 01865 200244) - Oxonian Park 565 sq m warehouse use available to let
K3	West side of canal	• King Sturge (Tel: 020 7493 4933) and Aitchinson Raffety (Tel: 01865 865658) - Design & Build Opportunities (6,500 sq m) - Endeavour House High Quality Office (2,032 sq m)

Nb: This list is in no way exhaustive of all the active marketing on-site, this is an indication of activity on prominent sites gathered via the site survey.

6.7. Summary

The results of the survey indicate a healthy stock of employment land and premises in Cherwell District. It was apparent that business clusters were well occupied and were providing an active business environment for a variety of different business activities.

Business clusters were assessed as generally being in good condition though some of the premises appeared to be slightly dated. The majority of business clusters benefited from good strategic access and internal road access was assessed as being adequate for existing activities. One common observation was that the sites had limited access to services and amenities, likely resulting in a higher number of car trips.

Although there has been some development over the last decade, the majority of premises would be at least 20 years old or older. Most of the more recent development has been in the B8 warehouse category while the stock of smaller light industrial units appeared to be of a lower quality and getting a bit rundown. There appears to be a lack of good quality office stock that would be suitable to modern businesses and more aligned with the development objectives of the Council.

7. THE EMPLOYMENT LAND MARKET IN CENTRAL OXFORDSHIRE

7.1. Introduction

As part of the Council's consideration of employment land issues the research department of Vail Williams was instructed to contact local property agents to discuss the characteristics of the Oxfordshire property market.

This work has entailed telephone-based research to gather perceptions on the general state and direction of the market for commercial property and employment land. Of particular interest to the Council was developing an understanding of whether the District and the wider area have distinct market areas and, if so, how they inter-relate. Having interviewed eleven agents/surveyors operating around Cherwell District, a degree of consensus has emerged which sets Cherwell District's property market within the context of the wider Oxfordshire/M40 market area.

7.2. Market Areas

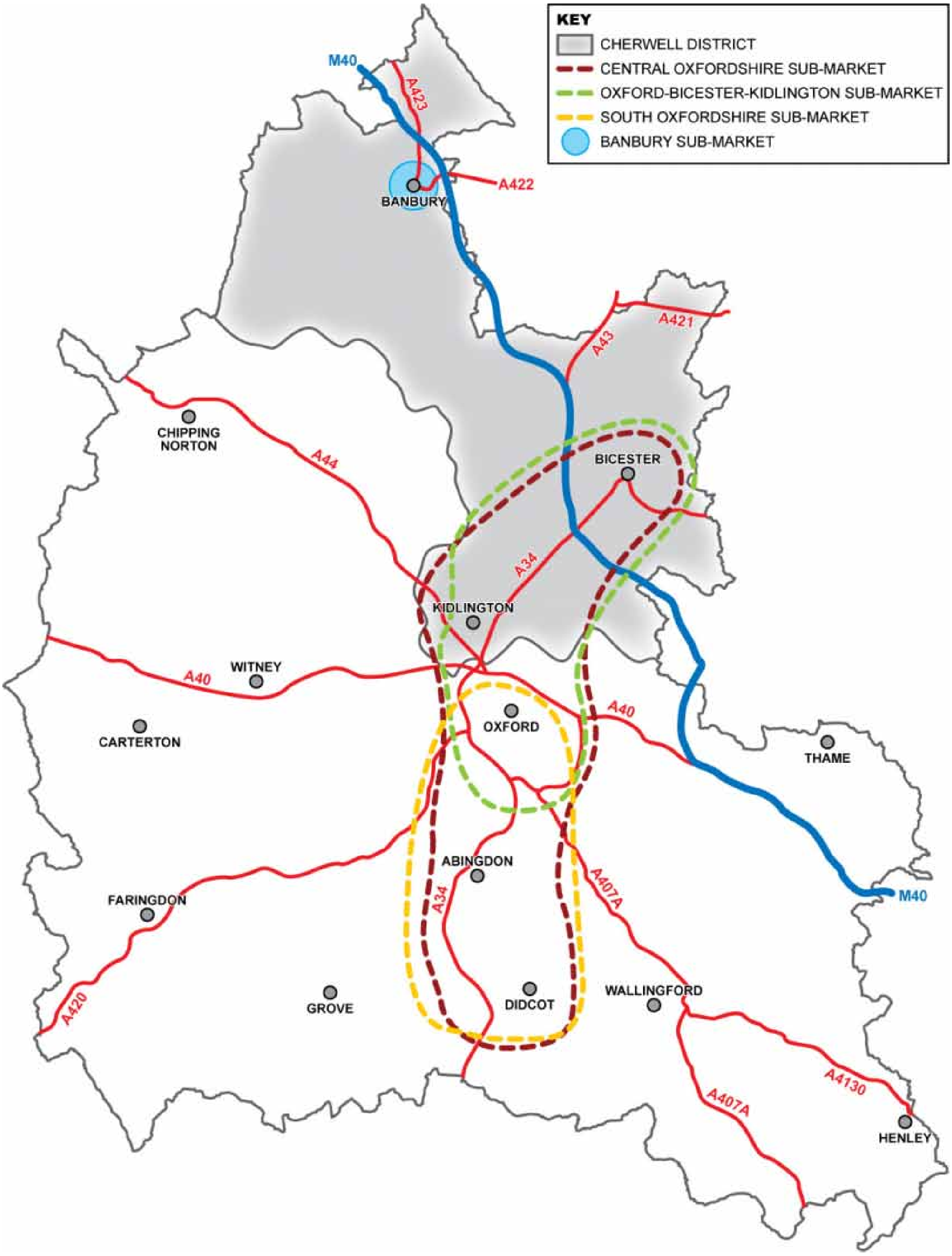
On a micro level each property and each town has its own characteristics. There are also clear groupings that make natural market areas. In addition there are particular linkages between them, related to types of land use and road infrastructure.

The principal market areas revealed by the Vail Williams research are shown in Figure 7-1 below.

There was broad consensus that there are four distinct but interactive sub-markets operating in Oxfordshire:

- The Oxford, Kidlington and Bicester sub-market having close access to both the A34 and M40.
- South Oxfordshire sub-market comprising Oxford, Abingdon and Didcot as historically the majority of Oxford's overspill has focused towards the south of the city.
- Central Oxfordshire sub-market running along the A34 connecting Bicester, Kidlington, Abingdon and Didcot and is believed to the major focus for expansion by university spin-offs and related overspill from Oxford. Bicester is also considered to be within the area of influence of the Oxford-Cambridge Arc.
- Banbury to the north of the District at Junction 11 of the M40 motorway tends to operate more independently but still has strong links with the southern part of the County.

Figure 7-1 Oxfordshire Employment Land Sub-Markets



So far as Bicester is concerned, it features in the Oxford-Kidlington-Bicester market as well as the linear M40 and A34 markets that we have described. Its strategic location near the intersection of the M40 and A34 is especially notable. Remarks from agents include reference to value contours affecting residential and commercial property: “There is migration of demand and values up the M40 and out of Oxford”.

There are also subtleties in terms of land use that have an influence within the market areas. One agent described the Oxford to Didcot area as having a particular “identity for industrial uses”, whereas “office activity is more focused on Oxford with migration of demand outwards to Abingdon, Witney, Kidlington and Bicester in part”. Other agents suggested that the migration effect was more noticeable to the north of Oxford than to the south, although there are spin-offs from Oxford’s science based companies that benefit Milton Park.

7.3. Employment Land Market Demand

Demand in Banbury

Demand for Banbury’s business space once centred on manufacturing but, like other parts of the UK, the local economy is now adapting to more profitable opportunities. A common perception of Banbury is that it is evolving. On the one hand the market has benefited from its excellent rail and road links, which support the more established distribution sector while on the other hand there is increasing investor interest to create new offices which are now in the process of being let.

Banbury Business Park at Adderbury has attracted significant interest with Vodafone occupying a large proportion of the site and a number of established organisations such as North Oxfordshire PCT Partnership, Charter Housing and the Ambulance Trust taking up space. This is despite the fact that Adderbury has no direct access to the motorway.

Banbury also performs a strong retail function and is a significant shopping location for parts of Oxfordshire, Warwickshire and Northamptonshire. It therefore serves a sub-regional market function that echoes its former success as a sheep and cattle market town. It is now well served by the M40 motorway and has the potential to diversify from its manufacturing history.

Demand in Bicester

Being some 20 miles south of Banbury, Bicester is better located for access to Oxford and the A34 corridor, in addition to being closer to the prosperous Chilterns, with the M25 corridor and London beyond. Bicester is also strategically located close to the A43 dual carriageway, which links the M1 and M40.

Historically, Bicester’s location has favoured B8 development but there are other land uses that are allowing the town’s economy to develop in a complementary fashion. For example, agents have cited the success of Avonbury Business Park, which has recently gained the interest of a number of high-tech companies. The presence of such businesses is evidence that Bicester based firms are engaged in the kind of high-tech activities commonly associated with Oxford's various science parks and innovation centres.

Agents have suggested that demand depends upon the quality of premises and our own experience confirms that office based firms are more sensitive to quality than industrialists. Another important factor affecting demand is the size of available units. Many new start-up businesses are looking for smaller size units while much of the available office space in Bicester tends to be in the larger size categories.

Overspill Pressures Influencing Demand

An interesting dynamic that occurs within the Cherwell area is the movement of companies between market areas due to overspill pressures.

Business activity around Oxford is seen as a driver for further business growth around the sub-region. Witness, "Oxford is undoubtedly generating demand" and, "overspill from Oxford is towards Bicester, Kidlington and Abingdon."

For example, one agent recounted that "Fresh Direct is a company that moved from Kidlington to Bicester". Mindful of this type of pressure, another contact said, "We need to protect employment land in Bicester. Oxford is very constrained".

Other comments reinforced market opinion that B8 development is in demand, particularly at Bicester and Banbury. "The M40 helps Bicester for distribution - there is not land available in Oxford for B8 and it is too congested". Agents recognise that the Council is wary of further development for the distribution market, nonetheless, market pressure for this type of use is strong and it forms a significant element of employment land take up.

Other overspill effects can be seen in the residential market. Several comments received highlight the price advantage of Bicester as a draw. There is a perception that Bicester's population growth, aligned to scope for commercial rental growth, is now creating good conditions for development of new business space.

Other comments from various agents regarding overspill effects include:

- Oxford demand tends to be City based but there is limited supply leading to the success of edge of town developments.
- Kidlington has seen a lot of growth from expansion out of Oxford. This has been for industry and offices.
- Banbury, Bicester and Kidlington are the main commercial areas outside Oxford.
- In Bicester there are growth pressures from new housing. Bicester is going through huge changes. We've got to build up the supply of modern business space.

7.4. Definitions for Sub-Market Areas

The market research by Vail Williams draws the conclusion that there are a number of distinct as well as interlinked sub-markets operating in Cherwell District and the wider Oxfordshire area. Markets identified in Section 7.2 above are:

- The Oxford-Kidlington-Bicester Sub-market
- The Central Oxfordshire Sub-market
- The South Oxfordshire Sub-market
- Banbury Sub-market

We do not have complete information on demand and supply for all of these areas and so have chosen to use the following approximations of relevant market areas:

- Banbury
- Bicester
- Oxford City Council, Kidlington town and Bicester town
- Cherwell District
- Oxfordshire County

It should be emphasised that the information for Bicester and Kidlington on their own should not be used out of context of the other market areas as it is clear from the Vail Williams work that Bicester and Kidlington operate as part of a number of wider markets. However, Banbury is recognised as its own distinct market and therefore its employment land needs will be individually assessed.

Cherwell District covers the key employment locations on the M40 corridor between Junctions 7 and 11.

Oxford City Council's boundaries are reasonably closely drawn around the City and so, together with data on Kidlington and Bicester, this represents a reasonable approximation of the Oxford-Kidlington-Bicester market.

Although Oxfordshire County does not necessarily capture any specific market it does cover the combined areas of most of the market areas coming from the Vail Williams research. We thus judge it is a useful area to consider.

8. FORECAST DEMAND AND SUPPLY

8.1. Introduction

In the previous section we have reviewed information on the nature of the employment land market covering Cherwell. We have seen that the three main market towns of Banbury, Bicester and Kidlington are part of several overlapping market areas. In this section we outline how we draw on this information to develop an approach to forecasting demand and supply and the need for allocating employment land.

8.2. Estimating Demand

Our starting point for estimating employment land demand is to review data on past rates of demand for B1/B2/B8 uses and calculate average annual levels of demand. We have then applied these figures to future requirements on the assumption that on average future levels of demand will be the same as past levels of demand. However there are various factors which suggest that future demand for employment land may be higher than past rates and our approach to these factors is outlined in Section 8.3 below.

The overall principles we have used in estimating the B1/B2/B8 demand for employment land in each of these markets is to try and collect data which most directly measures demand for new employment land, in this case using past trends in floorspace completions as a proxy for demand, and to try and use information which covers a full business cycle in order to smooth out annual variations in demand as the economy and sector grows or contracts at varying rates. A ten-year period is usually a reasonable estimate for a full business cycle.

We have not found direct information on take-up of employment land over time. There is though information on take-up of employment floorspace, and information on market take-up of all employment floorspace. There is also contextual information on total floorspace stock, age of stock and vacant floorspace.

The principal sources of information used for estimating demand are data on completions of new properties (‘completion rates’). These have been collected by Cherwell District and the other districts of Oxfordshire and passed on to Oxfordshire County Council. Information for Cherwell has been drawn direct from Cherwell District from their annual monitoring reports. This data is based upon on-going monitoring and fieldwork checking on completions across the District. Information for the other districts comes from Oxfordshire County Council’s Employment Land and Development Monitor 2000.

One point to note is that there is a difference between the annual completion rates reported for Cherwell in the County’s Employment Land and Development Monitor and our analysis of Cherwell District’s annual completions monitoring. We have double-checked the data and believe our figures are an accurate analysis of Cherwell Council’s data. (The County Council data is based on planning applications submitted from the each district).

Information on employment floorspace is also relevant as there may be a surplus of vacant new and good condition stock on the market that could absorb some demand before there is a need to develop new sites. We have considered relevant information for Cherwell District. Available data does not distinguish between new and second hand stock. This is a relevant factor as older second hand stock in particular is either a separate market or is no longer suitable for modern employment use. We have reviewed available information on age of stock in drawing conclusions on the amount of available suitable quality stock that is comparable with development on new sites.

We do not at present have information on vacant stock on the market in the other Oxfordshire districts and so include comment on what the implications might be if vacancy levels are similar to those in Cherwell.

8.3. Factors Likely to Influence Demand

There are three principal reasons why estimates of past take-up rates of B1/B2/B8 space may not accurately reflect future levels of demand for employment land:

- It is possible that underlying economic factors may mean that future demand for employment land differs from past rates of demand
- It is possible that past rates of demand may have been constrained by policy and/or other supply-side constraint factors which if removed would allow an increase in expressed demand
- B1/B2/B8 uses do not capture all the types of users that typically occupy industrial land.

Data we have reviewed to date suggests that there is not a clear and quantitative way of measuring these influences in the context of Cherwell. However they could have a significant impact on total demand and therefore we have considered these matters more thoroughly below and present our conclusions on the potential impact on demand.

As past take-up rates remain the most direct and quantifiable measure of demand we rely on this as the primary source for estimating demand, but with the caveat that in our judgement these other factors suggest that past estimates are minimum estimates and demand might be significantly higher.

Future Demand and Economic Growth

Attempts have been made to forecast future economic growth. Experian prepared economic forecasts as part of the South East Plan. The forecasts have been reviewed by Oxfordshire County Council who judged that they under-estimated the drivers of growth in Oxfordshire. Consequently there are currently no regional economic growth forecasts that have been agreed by relevant key local government organisations. This section presents a summary of some of the underlying factors and does not seek to quantify these impacts.

There are a number of recent infrastructure investments and wider economic factors which suggest that future demand for employment land in central Oxfordshire may be higher than past rates of growth.

Locational Advantages

Cherwell District, located at the top of Oxfordshire County is well placed with respect to trunk road infrastructure. Although the M40 motorway is now well established, the extension from Oxford to Birmingham is recent when viewed in the context of long-term economic cycles. The same is true of the much-improved east-west links between the M1 and M40 – particularly the duelling of the A43 from Junction 10 of the M40 to Junction 15a of the M1. This considerable investment in road infrastructure is continuing to have a positive effect and influence upon the local economy.

The full benefits of this road infrastructure investment have not yet been realised and it is possible that positive impacts on demand of this investment may accelerate in future years. While it is difficult to judge whether future impacts will be the same or greater than impacts in recent years, it is clear that Cherwell's main market towns have a number of significant locational advantages which have been augmented in recent years.

Banbury

As can been seen from Figure 7-1 Banbury is located at the northern tip of Cherwell District. It benefits from excellent north-south road links as well as east-west connections. Located just off Junction 11 of the M40 linking Warwick, Royal Leamington Spa and Birmingham, Banbury provides a convenient interchange between the Midlands and London. Banbury also has good connections heading east towards Milton Keynes via the A422 and A421.

Banbury, as a result of its excellent road infrastructure, has capitalised on its location with substantial B8 warehouse and distribution investment pouring into the local economy over the last decade.

Bicester

Bicester occupies a strategic position between London and the Midlands. Arguably the road access is superior to that of Oxford because Bicester is just three miles from Junction 9 of the M40. Being a smaller settlement it is also less congested and the A41 between the motorway and Bicester is a dual carriageway. The A43/M1 and the M40/M6 offer excellent links to the north and the A34 is a reliable route to the M4, M3 and the south coast. This places Bicester within easy driving time of the Thames Valley, Oxford, Birmingham and the M1 at Milton Keynes or Northampton. With this infrastructure the town is well placed for companies to reach their customers and suppliers. This is positive for attracting further demand for business space.

Oxford Innovation Ltd produced a report in 2005, 'Bicester – Economic Profile and Potential' which expressed the view that there is possible additional demand. Their report states that Bicester has the potential to accommodate the growth of spin-out companies as research indicates that 85% of companies re-locate locally when they graduate from an innovation centre.

Kidlington

The smallest of the three main market towns in Cherwell, the village of Kidlington is located just five miles north of Oxford City on the A44. In recent years Kidlington has been developing its high-tech and office offerings, positioning itself to absorb some of the potential overflow from Oxford University's spin-off businesses. Begbroke Science Park, located just west of Kidlington, is well known for the calibre and nature of work undertaken and has been particularly successful in linking research, industry and spin-off companies.

Located near a major junction connecting three separate A-roads (A34, A40, A44), Kidlington is well positioned to provide overflow demand from Oxford with well-connected and easily accessible premises.

Science Park and Innovation Centres Demand

Oxford is the centre for a number of high technology and/or high growth potential economic sectors that are anticipated to see significant growth in future years. With the right conditions the driver of Oxford's economy can extend to surrounding towns such as Bicester and Kidlington.

Drivers of property demand, such as the numerous science parks and innovation centres in the area, are now well established and Bicester and Kidlington could benefit more than they have done to date from such growth. In the last five years there has been growing interest in the development of the M40 office economy on the strength of research and development. In particular, Vail Williams note a report by Lambert Smith Hampton that identified that the presence of Innovation Centres has 'been the driving force behind the success of the M40 motorway corridor' (Lambert Smith Hampton press release 2002). Furthermore, their research highlighted 'nine centres in Oxfordshire which foster growth for emerging new, start-up or spin-off companies' as a driver for demand, adding, 'This will be in addition to the existing demand'.

The growth in high-tech sectors building on the attraction and weight of Oxford can extend beyond Oxford. As already discussed local property markets for Oxford and Cherwell overlap in a number of respects. The impact of this growth should thus be captured in consideration of demand for the Oxford-Kidlington-Bicester sub-regional market and Oxfordshire markets. However for this full benefit to be realised supply-side factors need to be right.

Non-B1/B2/B8 Demand

Our experience working on a number of employment land studies in the South East of England suggests that employment areas often have a number of non-B1/B2/B8 uses which are appropriately located together with industry but which are not usually picked up in statistics on B1/B2/B8 availability, take-up and completions. Such uses typically fall under a sui generis land use category and include:

- Waste processing facilities and recycling centres.
- Scrap yards.
- Utilities infrastructure such as sewage treatment works, pumping stations and power stations.
- Bus and train depots and workshops.
- Secondary retail/service activities serving industrial areas (cafes, local shops etc).

In addition there are a number of other uses often seen on industrial areas, such as retail warehousing and car showrooms, that may not be appropriate to accommodate in future employment land development for planning policy reasons.

A full analysis of non-B1/B2/B8 demand is presented in **Appendix E**. In summary key factors coming out of our analysis on non-B1/B2/B8 demand include:

- There will be a growing demand for waste sector facilities and some industrial areas in Cherwell, and possibly elsewhere in relevant employment land markets, could be well placed to accommodate this demand;

- Initial evidence of other non-B1/B2/B8 uses in Cherwell suggests there are relatively few such occupiers. However it is possible that data is incomplete and/or there are specific reasons why there are modest numbers of such uses in Cherwell. In addition we have not analysed the demand for such uses in other parts of relevant employment land markets, such as in Oxford City, and such places may have more significant elements of non-B1/B2/B8 uses;

- Surveys elsewhere suggest non-B1/B2/B8 uses can occupy around 15% of industrial areas.

We judge that the demand for non-B1/B2/B8 uses is a valid element of demand that should be added on to the demand for B1/B2/B8 uses. In the context of Cherwell the statistics used for forecasting B1/B2/B8 demand in Section 5 below largely do not pick up on this extra element of demand. We have prepared forecasts assuming this demand represents 10% of B1/B2/B8 demand. Given the relative lack of data and uncertainties over the scale of demand we present these demand scenarios separately from the core B1/B2/B8 demand.

Conclusion

In conclusion we judge that:

- There are good reasons why future demand for employment land in central Oxfordshire may be higher than past rates of demand.

- There are a number of supply-side constraints, in particular affecting Oxford City which suggest expressed demand in Bicester and the south of Cherwell is lower than potential demand.

8.4. Historic Demand in Cherwell

This section considers past rates of completions of new employment space and take-up of floorspace for Cherwell District, broken down by the sub-areas of Banbury, Bicester, Kidlington and rural Cherwell.

In this section we present information on completions in Cherwell. This information is collected by Cherwell District on an annual basis and estimates total new gross floorspace. In Section 9 we consider how this can be translated in to demand for employment land.

In this section we also consider past floor space take-up rates. Ideally this would cover take-up of just new floor space as this links most directly with land requirements. However the data set on floor space take-ups covers all employment floor space including new and second hand space, as information is not readily available on just new space.

Completions

Cherwell District Council collects and publishes data on employment properties completions by uses – office (B1), factories (B2), warehouses (B8) and alternative (mix of B1, B2 and B8). Gross figures give the total floorspace built in one year. Completions in the District have averaged 27,519 sq m per annum over the ten-year period. Table 8-1 shows how annual average completions are divided between geographic sub-areas and B1, B2 and B8 uses.

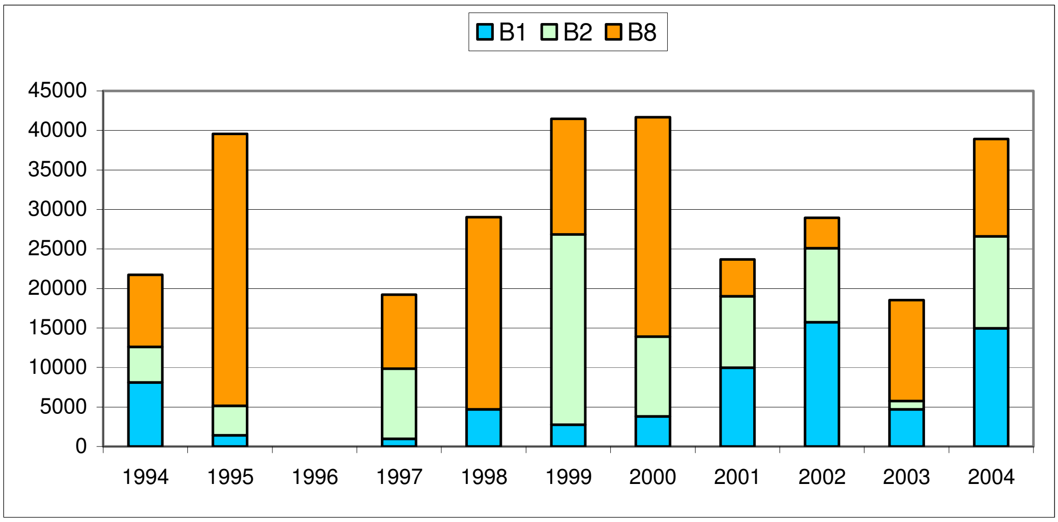
Table 8-1 Cherwell B Class Average Annual Completions (m sq) 1994-2004

	Office	Industry	Warehouse	Total
Banbury	2,976	3,802	7,842	14,620
Bicester	736	1,652	4,532	6,919
Kidlington	1,832	1,479	1553	4,864
Rural	555	560	0	1,115
Cherwell Total	**6,099**	**7,492**	**13,927**	**27,519**

Source: CDC Employment Monitoring Database, 2005

Figure 8-1 below shows the distribution of B1, B2 and B8 for each year. A significant element of employment floorspace demand in the District has been warehouse (B8) facilities, averaging 13,927 sq m per annum. Office completions are less than half of that with average completions of 6,099 sq m per annum. Industrial completions experienced a strong growth period between 1999 and 2003 then declining in 2004 resulting in the annual average of 7,492 sq m of industrial completions over the full ten-year period analysed for this study.

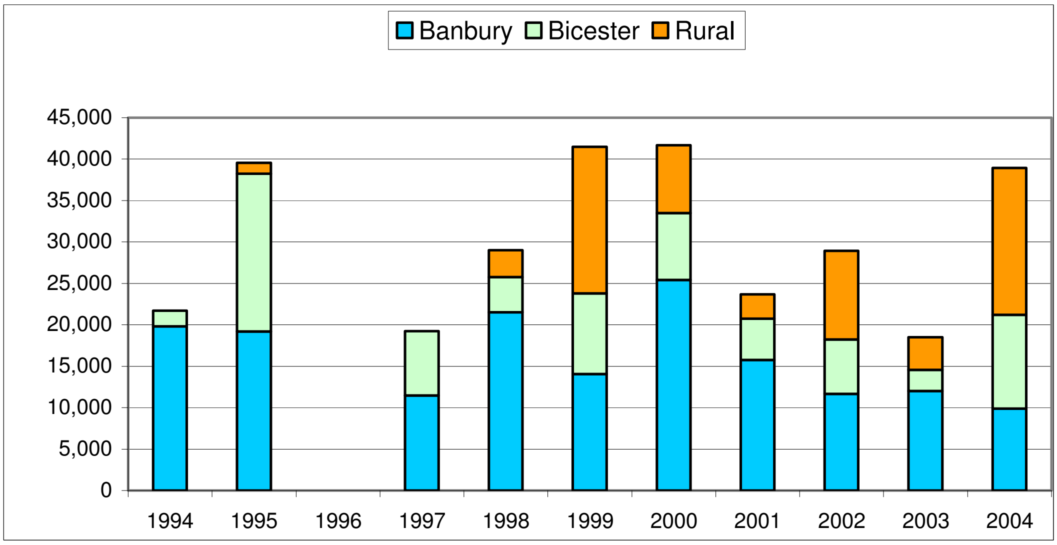
Figure 8-1 B Class Completions (gross floorspace, sq m) by Type 1994-2004



Source: CDC Employment Monitoring Database, 2005

Figure 8-2 below maps completions by geographic area over time and shows the growing importance of the rural areas in providing employment locations in the District. Banbury has an annual average completions rate for all B class development of 14,620 sq m while Bicester has an annual average completions rate of less then half of that at 6,919 sq m B class development per annum.

Figure 8-2 B Class Completions by Sub-Area 1994-2004



Source: CDC Employment Monitoring Database, 2005

Alternative Measure of Demand: VOA Data

An alternative possible statistic to use for demand for floor space is to look at changes in occupied floor space using Valuation Office Agency (VOA) data. It is potentially informative to compare this data with Council completions data, as it is possible the Council data may not have picked up on all completions and could be an under-estimate of demand.

We have reviewed VOA data for the period 1998 to 2004. The data is for net internal floor space and we have increased this by 15% to estimate gross external floor space – the same measure as used for the completions data. With the VOA statistics on average between 1998 and 2004:

- total office (B1) space has increased by 8,242 sq m per annum
- total industrial (B2) space has increased by 12,267 sq m per annum
- total warehouse (B8) space has increased by 23,383 sq m per annum

These represent on average 36% more floor space than the completions data. There are a number of reasons that can explain some of this difference including:

- VOA measures all occupied stock whereas Council completions data measures only new stock where 25 or more employees are expected. This could amount to a significant level of stock if there have been a large number of smaller business and/or businesses with low employment densities opening in the District.
- VOA data includes vacant space, including vacant space not on the market. Consequently it may to a degree over-estimate demand particularly during down-turn periods when companies may hold on to vacant space while planning consolidation or in the anticipation of pick-up.

Overall the comparison suggests that the completions data is an underestimate of historic demand.

Past Floorspace Take-Up

Cherwell District Council maintains records of new and second hand employment floorspace that is taken-up (recorded as sold or let) over a number of years and we have analysed the level of take-ups for the four year period between 2001 and the end of 2004. Table 8-2 below shows annual take-ups for the District.

Table 8-2 Cherwell Take-up of B Class Space (sq m net) by Sub-area

	2001	2002	2003	2004	Average Annual take-up
Banbury	26,520	7,273	14,068	8,225	14,021
Bicester	6,553	10,386	13,511	9,929	10,094
Kidlington	1,421	8,921	2,147	3,327	3,954
Rural	9,549	3,632	6,217	3,066	5,616
Total	**44,046**	**30,214**	**35,945**	**24,548**	**33,688**

Source: URS Analysis, CDC Cumulative Monitoring Reports, 2005

Take-ups in Banbury have accounted for 42% of all take-ups in Cherwell at 14,021 sq m per annum. Bicester has averaged 10,094 sq m of take-ups per annum, Kidlington 3,954 sq m per annum and 5,616 sq m average annual take-up in the more rural areas of Cherwell. The total per annum take-ups in the District are 33,388 sq m. (Please note these figures are net internal areas and so are not directly comparable with completions data).

We do not have readily available information on what proportion of the take-up is for new and what is for second hand space. If average completions are used as a proxy for take-up of new space then this implies demand for second hand space is around 8,921 sq m pa (i.e. 33,688 sq m total take up less an adjusted 24,767 net completions of B class space).

Conclusion

Analysis of past take-up rates suggests that demand for new B class space averages at least 14,620 sq m for Banbury, 6,919 sq m pa for Bicester, 5,979 sq m in Kidlington and other rural area for a total of 27,519 sq m pa for Cherwell District. In addition there is significant demand for second hand space across the District with total annual average demand for new and second hand space of 33,688 sq m.

8.5. Historic Demand in the Market Areas

As set out in Section 7, Bicester and Kidlington are part of larger interactive markets as opposed to Banbury, which is assessed as being a separate distinct market. Therefore, this section reviews information on demand for new space in the two areas of:

- Oxford/Bicester/Kidlington
- Oxfordshire County

Demand in the Oxford/Bicester/Kidlington Sub-market Area

Table 8-3 below shows average annual completions for Oxford, Bicester and Kidlington. In total these amount to 48,859 sq m pa for the area. Oxford represents the largest element of demand, at 37,075 sq m (76% of total demand), though it is possible the figures for Oxford are slight over-estimates – they are calculated for a different time frame than the Bicester and Kidlington data.

Table 8-3 Average Annual Completions in Oxford/Bicester/Kidlington[13]

	Offices	Industry	Warehousing	Total	%
Oxford City	11,875	17,825	7,375	37,075	76%
Bicester	736	1,652	4,532	6,919	14%
Kidlington	1,832	1,479	1553	4,864	10%
Total	**14,443**	**20,956**	**13,460**	**48,859**	100%
% split	30%	43%	28%	100%	

Sources: URS Analysis, CDC Monitoring Reports, 2005, Oxfordshire County Council Employment Land and Development Monitor 2000

Demand for industrial space is the largest element of the total demand – at 20,956 m sq this represents 43% of the total.

Demand in Oxfordshire County

Table 8-4 below shows average annual completions for Oxfordshire County. In total this amount to 103,950 sq m pa for the County. Oxford represents the largest element of demand, at 37,075 sq m – 36% of total demand[14].

[13] Data for Oxford is taken from OCC Employment Land and Development Monitor 2000 for 1996/7 to 1999/00. Data for Bicester and Kidlington is taken from the Council monitoring reports and is for 1994 to 2004. Analysis of the OCC figures suggests these are not totally compatible – e.g. Bicester demand from OCC is an annual average of 8,377 m sq vs 6,919 m sq above.
[14] Note the different figure for Bicester from Table 8-4 due to different timeframes.

Table 8-4 Average Annual Completions in Oxfordshire County (1996/7 to 1999/00)

	Offices	Industry	Warehousing	Mixed	Total pa	%
Oxford City	11,875	17,825	7,375	0	37,075	36%
Banbury	750	1,875	16,450	4,200	23,275	22%
Bicester	325	0	8,175	0	8,500	8%
Didcot	350	2,225	2,050	0	4,625	4%
Witney	625	350	175	0	1,150	1%
Rural Areas	14,175	10,150	2,150	2,850	29,325	29%
Total	**28,100**	**32,425**	**36,375**	**7,050**	**103,950**	100%
% split	27%	31%	35%	7%	100%	

Sources: Oxfordshire County Council Employment Land and Development Monitor 2000

Demand for warehouse space is the largest element of the total demand – at 36,375 m sq this represents 35% of the total. However demand is relatively evenly spread across the three principal employment land-use categories.

Conclusions

Table 8-5 below summarises analysis on demand by area and by B1, B2 and B8 (mixed use has been excluded as this data was not available for all the market areas).

Table 8-5 Average Annual Completions in Market Areas Relevant to Cherwell

	Offices	Industry	Warehousing	Total	%
Banbury	2,976	3,802	7,842	14,620	15
Bicester	736	1,652	4,532	6,919	7
Cherwell	6,099	7,492	13,927	27,519	28
Oxford/Bicester/Kidlington	14,443	20,956	13,460	48,859	50
Oxford City	11,875	17,825	7,375	37,075	38
Didcot	350	2,225	2,050	4,625	5
Oxfordshire	28,100	32,425	36,375	96,900	100

Sources: URS Analysis, CDC Monitoring Reports, 2005, Oxfordshire County Council Employment Land and Development Monitor 2000

The table shows that historic expressed demand in Bicester is a relatively small element of the various approximations of market areas compared to historic demand in Banbury, which is twice as much.

Banbury represents 53% of Cherwell's overall demand and 15% of Oxfordshire's total demand. Bicester, represents 25% of Cherwell's total demand, 14% of the Oxford/Bicester/Kidlington market area total demand and 7% of Oxfordshire's overall demand. This suggests that if land were constrained in other parts of the larger markets, but were available in Banbury, Bicester or Kidlington, there could be scope for demand to be re-directed to those towns and this could result in a considerable increase in demand for employment space in Cherwell District as a whole. The next section considers supply of employment land in each of these areas.

8.6. Supply of Premises and Land

This section presents information on employment premises currently available on the market and vacant land potentially available for development. Information on the supply of employment land for Cherwell District is taken from the recently completed URS survey of employment land in the District. This involved on-site inspection of all allocated employment sites in the District and has been supplemented by market research by Vail Williams.

Information on employment premises is presented for Cherwell District and broken down by the type and amount of floorspace available in each sub-area. Information on vacant land potentially available for development is broken down by sub-area for Cherwell District and for Oxfordshire County it is broken down by availability in the remaining local authorities of South Oxfordshire, West Oxfordshire, Vale of White Horse and Oxford City.

Information for the other Oxfordshire districts has been obtained from their local plans, annual monitoring reports, employment land audits where available and from discussions with council officers. Not all of these districts have completed employment land studies and it is possible there may be some inaccuracies in the data. However as far as we are aware we do not believe any errors that there might be are significant enough to alter the overall direction of our analysis and conclusions.

URS research coupled with Vail Williams' review of employment land and space markets in central Oxfordshire indicates that there is an increasing constraint on the supply of employment land, particularly in Oxford City. Some of this demand is captured as part of the wider market areas but is is also possible that until the image of locations such as Bicester has changed some of this demand may be being suppressed due to the lack of supply in Oxford and not fully expressed in past take-up statistics.

Supply of Floor Space in Cherwell

The Autumn 2005 Commercial Property Register indicates that there is 179,131 sq m net of B use class floor space on the market in Cherwell. This covers new and second hand space. Figures are presented in Table 8-9 below.

Table 8-6 Distribution of Net Available B Class Space in Cherwell, Autumn 2005

	Office		Industrial		Warehouse		Total
	sq m	% of total	sq m	% of total	sq m	% of total	
Bicester	5,020	11%	34,478	77%	5,008	11%	**44,506**
Banbury	29,369	34%	37,003	43%	20,472	24%	**86,844**
Kidlington	9,675	28%	24,421	72%	0	0%	**34,096**
Rural	5,463	40%	1,170	9%	7,049	52%	**13,682**
Total	**49,527**	**28%**	**97,072**	**54%**	**32,529**	**18%**	**179,128**

Source: URS Calculations, Autumn 2005 Commercial Property Register, Cherwell District Council

Space available in Banbury represents 48% of available space in the District, Bicester makes up another 25% of available space while Kidlington and the rural areas make up the remainder of the 179,128 sq m of available premises on the Register. With respect to the types of premises of offer, Bicester has relatively little office space available with only 5,020 sq m compared to Banbury, which has 29,369 sq m.

As discussed in Section 6.3 the VOA maintains information on the age or condition of commercial floorspace. This data showed that pre-1970 stock makes up 50% of the total stock. Older stock is often not suitable for modern business use and such stock that is on the market should be discounted. In subsequent analysis we assume that 25% of total available stock will not meet demand requirements and so is discounted.

Supply of Land in Cherwell District

The URS employment land survey identified 25 potential sites for employment development in Cherwell District, totalling approximately 94.8 ha of land. Potential development sites included:

- Designated but undeveloped employment sites allocated in the Non-Statutory Cherwell Local Plan 2011.
- Vacant or underutilised sites in existing industrial areas identified through the survey.

A number of the proposed development sites in the Non-Statutory Cherwell Local Plan were found to be fully or partially developed since its publication.

Banbury

In Banbury there were 13 sites identified as having development potential. In addition to the existing sites designated in the Non-Statutory Local Plan, the survey identified seven infill development sites. These included vacant land, land with vacant and derelict buildings and large underutilised car park areas.

The largest site available is the 21 hectare Thames Water site, which is located to the south of Overthorpe Road and to the west of the M40. It is near to a number of established warehouse and distribution parks but further B8 development on this site is contrary to the Council's Economic Development Strategy and they would be seeking B1 and B2 uses to be established there.

Newly identified sites are marked with an asterisk in Table 8-7 below. Banbury's potential development sites account for 50% of the available land in Cherwell District.

Table 8-7 Land Available for Potential Development in Banbury

Ref no	Name	Site Area (ha)
BA1.1	Banbury Cross Business Park	2.48
BA1.3	Banbury Cross Business Park *	1.0
BA1.2	Banbury Cross Business Park	3.3
BA2	Land North of Overthorpe Road*	5.8
BA1.4	Banbury Cross Business Park	1.0
BA3	Land South of Overthorpe Road	21.0
BA12	Alcoa Site*	0.9
BA14	West of Hardwick Farm	0.7
BA11	Alcan Site	10.6
BA10.1	Beaumont Industrial Estate *	0.6
BA10.2	Beaumont Industrial Estate *	0.1
BA7.2	Marley Industrial Estate *	0.02
BA7.1	Marley Industrial Estate *	0.5
	Total	**48.0**

** New Development Sites identified via URS Survey, Dec 2005*

Bicester

The URS employment land survey identified five sites in Bicester as potential development sites. Each of the sites is designated as such in Cherwell's non-statutory Local Plan. The sites comprise approximately 43.9 ha of allocated employment development land in Bicester.

The Launton Road site has a large derelict vacant building on site that would need refurbishment or a complete redevelopment to be suitable for modern business needs. The site is currently designated for mixed-use development.

The land at Bicester Airfield (9 ha) refers to the Technical Buildings area only. The buildings have been listed by English Heritage and further development on the airfield site would be limited to the modernisation of the buildings for modern business use. It is envisaged that uses on site could include offices, light manufacturing and storage. The site is protected by Policy EN49a in Cherwell's Non-Statutory Local Plan.

A rough calculation of available floor space that could be appropriate for employment activity at the airfield site is around 11,200 sq m (B2) provided by the four main hangars and about 2,000 sq m (B1) provided by additional outbuildings[15]. Consequently the unrestricted equivalent developable land area for the airfield site is believed to be less than the 9 ha of allocated land and more likely to be around 3.5 ha[16] based on the standard plot ratios set out in Section 8.

Four additional sites are identified in the Non-Statutory Cherwell Local Plan but the sites have subsequently been developed and occupied.

Details of land in Bicester potentially available for employment development are presented in Table 8-8 below.

Table 8-8 Land Available for Potential Development in Bicester

Ref no	Name	Site Area (ha)
B7	Land north of Gavray Drive (East and West)	14.7
B6	Launton Road	3.4
B8	Airfield – Technical Buildings	3.5
B9	East of A41 Oxford Road	16.0
B1.1	Bicester Park	0.8
	Total	**38.4**

Source: URS Cherwell Employment Land Survey, 2005

It is important to emphasise that apart from Gavray Drive the only other substantial area of employment land is at Oxford Road (16 ha). Existing information suggests this land is unlikely to come forward for development for some time. If this is the case then Gavray Drive is the only feasible employment site in Bicester. If Gavray Drive did not come forward for development there is almost no other employment land available for development in the short to medium term in Bicester.

Kidlington

The Non-Statutory Cherwell Local Plan designated four sites in Kidlington for employment generating development, most of which have now been fully or at least partially developed. The URS employment land survey identified five small sites for potential development in Kidlington, one of which was already designated as such; the others were identified via the survey as being vacant or underutilised and therefore available for development. Sites in Kidlington total 3.2 ha of land available for potential development, around 3% of the land available in Cherwell. Newly identified sites are marked with an asterisk in Table 8-9 below.

[15] CDC may able to refine amount of space available.
[16] Hectares based on standard plot ratios presented later on in Section 8.1. (11,200/0.4)/10,000 and (2,000/0.33)/10,000

Table 8-9 Land Available for Potential Development in Kidlington

Ref no	Name	Site Area (ha)
K3.1	West Side of Canal*	0.6
K3.2	West Side of Canal*	0.8
K5.1	Oxford Spires	0.9
K5.2	Oxford Spires *	0.4
K4.1	Motor Park*	0.5
	Total	**3.2**

** New development sites identified via URS Survey, Dec 2005*

Rest of Cherwell

The Non-Statutory Cherwell Local Plan designated four sites for employment generating activity outside the three main settlements discussed above. The URS employment land survey visited each site and found that one (Oxford Industrial Park, Yarnton) had been completely developed and one had some partial development underway (Banbury Business Park) leaving a portion of the site available. The sites available for potential development in the more rural parts of Cherwell District are listed below. These sites total 6.2 ha of land, around 6% of the land available in the District.

Table 8-10 Land Available for Potential Development in the Rest of Cherwell

Ref no	Name	Site Area (ha)
R4	Banbury Business Park	3.6
R3	Brymbo Works Ironworks	0.7
R5	PA Turneys Weston on the Green	1.9
	Total	**6.2**

Source: URS Cherwell Employment Land Survey, 2005

Cherwell District

In summary, there are approximately 94.8 ha of land available for potential employment generating development in Cherwell District. Banbury accounts for 50% of the available land and Bicester accounts for 41% of the available land. A summary of the land available for potential development is provided in Table 8-11 below.

Table 8-11 Total Land Available for Potential Development in Cherwell

Location	Available Development Area (ha)	% of total
Bicester	38.4	41
Banbury	48.0	50
Kidlington	3.2	3
Rural	6.2	6
Total	**95.8**	**100**

Source: URS Calculations, 2006

8.7. Supply in Oxford-Kidlington-Bicester

Future employment generating development within the Oxford-Kidlington-Bicester central market area identified in Section 7 appears to be heavily reliant on the land available in Bicester. Market research indicates land availability in Oxford City is subject to various constraints and is in demand from a range of competing uses. Using Oxford City's Adopted Local Plan 2001-2016 as a guide and referring specifically to Section 14 (Development Sites), it appears most of the potential employment development in Oxford would form elements of mixed use schemes. There are few sites designated for the sole purpose of employment activity.

Figures for the amount of land immediately available for employment development were not readily available so for the purpose of our analysis we have estimated that there are around 10 ha of land available for employment development in Oxford (10 ha may be generous as the Oxfordshire County Council Employment Land and Development Monitor 2000 reports Oxford City Local Plan Allocations for employment land are 4.6 ha). Table 8-12 below shows the amount of land available within the central market area based on our assumptions for Oxford City.

Table 8-12 Land Available for Potential Development Oxford-Kidlington-Bicester

Location	Available Development Area (ha)	% of total
Oxford City	10.0	19
Kidlington	3.2	7
Bicester	38.4	74
Total	**51.6**	**100**

Source: URS Research and Calculations, 2006

8.8. Supply in Oxfordshire

In addition to Oxford City, URS have reviewed local plans and proposals maps and also made enquiries to the local authorities to ascertain the amount of land available in the other districts of Oxfordshire County. Results are presented in **Appendix F** for each District. Figures have been checked against OCC's Employment Land and Development Monitor and are in line with the report and with what was learned from enquiries to Council officers.

In summary, there is approximately 169.3 ha[17] of land available for potential employment development throughout Oxfordshire County of which 94.8 ha of that is within Cherwell District. Further details of the breakdown of available land in the County are presented in Table 8-13 below.

Table 8-13 Land Available for Potential Development in Oxfordshire County

District	Estimate of land available (ha)	% of total
Cherwell	94.8	56%
Oxford City	10.0	6%
West Oxfordshire	14.0	8%
Vale of White Horse	35.6	21%
South Oxfordshire	14.9	9%
Total	**169.3**	**100%**

Source: URS Research, 2006

[17] 169.3ha could be an overestimate. According to Oxfordshire County Council's Employment Land and Development Monitor 2000 there was 144.2ha of local plan allocations of land for employment. This would serve to enhance our arguments set out in Section 9 below.

9. COMPARISON OF DEMAND AND SUPPLY

9.1. Introduction

This section draws together analysis in the previous sections and compares demand with supply of employment land in each of the market areas. It presents our estimate of the supply of land in each area expressed as a number of years worth of demand.

In the analysis below the following plot ratios have been used to convert floor space demand in to land demand:

- B1 office business park: 0.33
- B2 industry: 0.40
- B8 distribution: 0.50

These figures are taken from the ODPM guidance on employment land studies [Box D.7: Plot Ratios for Employment Use (Gross Floor Space to Site Area)].

In the analysis below we also add in an extra allowance for non-B1/B2/B8 demand typically expressed on industrial areas. This covers uses such as scrap yards, waste/ recycling facilities and utilities. We have assumed this represents 10% of B1/B2/B8 demand.

9.2. Demand and Supply in Banbury

Table 9-1 presents our analysis of supply and demand for employment land in Banbury. As set out in Section 7, Banbury is often viewed as its own self-sufficient market so in that respect land requirements for Banbury will firstly be assessed as a distinct market.

Our analysis assumes average past demand rates continue into the future, using average annual completions as a proxy for floorspace demand. It also assumes the distribution of demand between B1/B2/B8 uses is the same as for Cherwell District rather than the historic distribution for Banbury. This is because demand in Banbury has historically been biased towards B8 uses and there have been relatively few opportunities for B1 and B2 development (prior to recent developments at Banbury Cross Business Park). Table 9-1 presents our supply and demand analysis for Banbury.

Table 9-1 Demand and Supply Analysis for Banbury

	Office	Industry	Warehouse	Total	Total inc allowance for non-B1/B2/B8
Assumed demand (same profile as Cherwell) (sq m per annum)	3,363	3,947	7,310	**14,620**	
Equivalent annual land demand (ha)	1.0	1.0	1.5	**3.5**	3.9
% split of land demand	29%	29%	42%	100%	
Land supply (ha)				**47.0**	
Years worth of supply available				**13.4**	**12.1**

Source: URS Calculations

The table shows that total annual floorspace demand in Banbury is 14,620 sq m. Using our assumed plot ratios this equates to an annual average land demand of 3.5 ha. Current land allocated for employment in Banbury is estimated at 47.0 ha. This land allocation equates to 13.4 years worth of historic demand in Banbury. When an allowance is made for non-B1/B2/B8 demand is added in annual average demand is 3.9 ha and the stock of allocated land represents 12.1 years worth of demand.

In addition Section 8.8 outlined information on availability of existing stock and the rate of demand for new and second hand space. This information suggests that there could be up to an additional 4.6[18] years of already available space in Banbury. In total this suggests there is between 16.7 and 18 years worth of supply in Banbury to meet demands of the Banbury property market.

9.3. Demand and Supply in Bicester

Table 9-2 presents our analysis of supply and demand for employment land in Bicester. It must be emphasised that this does not present our view of its position in a distinct market. As explained in Section 7 market research by Vail Williams finds that Bicester is part of several wider markets. Our analysis assumes average past demand rates continue in future. It also assumes the distribution of demand between B1/B2/B8 uses is the same as for Cherwell District rather than the historic distribution for Bicester. This is because demand in Bicester has historically been biased towards B8 uses as at Bicester Park and there have been fewer B1 and B2 developments.

[18] Banbury Average Annual Take-up 14,021 sq m. Available Floorspace in Banbury 86,846 sq m. Assume around 25% of total stock is no longer suitable for modern industry as too old therefore 65,135 sq m of available floorspace. 65,135/14,021sq m=4.6.

Table 9-2 Demand and Supply Analysis for Bicester

	Office	Industry	Warehouse	Total	Total inc allowance for non-B1/B2/B8
Assumed demand	1,534	1,884	3,502	**6,919**	
(same profile as Cherwell) (sq m per annum)					
Equivalent annual land demand (ha)	0.5	0.5	0.7	**1.6**	1.8
% split of land demand	28%	29%	43%	100%	
Land supply (ha)				**38.4**	
Years worth of supply available				**24.0**	**21.3**

Source: URS Calculations

The table shows that total annual floor space demand in Bicester is 6,919 sq m. Using our assumed plot ratios this equates to an annual average land demand of 1.6 ha. Current land allocated for employment in Bicester is estimated at 38.4 ha. (This figure assumes that an equivalent of only 3.5 ha of land will be available at the airfield site rather than the 9 ha area of the site as development will be restricted to existing buildings). This land allocation equates to 24 years worth of supply in Bicester based on historic demand.

When an allowance is made for non-B1/B2/B8 demand is added in annual average demand is 1.8 ha and the stock of allocated land represents 21.3 years worth of demand.

In addition Section 8.8 outlined information on availability of existing stock and the rate of demand for new and second hand space. This information suggests that there could be up to an additional three[19] years of already available space in Bicester. In total this suggests there is between 25 and 27 years worth of supply if historic demand and supply in Bicester is treated in isolation of the markets in which Bicester sits.

9.4. Demand and Supply in Kidlington

Table 9-3 presents our analysis of supply and demand for employment land in Kidlington. It must be emphasised that this does not present our view of the position in a distinct market. As explained in Section 7 market research by Vail Williams finds that Kidlington is part of several wider markets. Our analysis assumes average past demand rates continue in future. It also assumes the distribution of demand between B1/B2/B8 uses is the same as for Cherwell District rather than the historic distribution for Kidlington in order for the analysis to be based on characteristics common to the District as a whole.

[19] Bicester Average Annual Take-up 10,094 sq m. Available Floorspace in Bicester 44,506 sq m. Assume around 25% of total stock is no longer suitable for modern industry as too old.

Table 9-3 Demand and Supply Analysis for Kidlington

	Office	Industry	Warehouse	Total	Total inc allowance for non-B1/B2/B8
Assumed demand (sq m per annum)	1,119	1,313	2,432	**4,864**	
Equivalent annual land demand (ha)	0.3	0.3	0.5	**1.1**	1.2
% split of land demand	27%	27%	46%	100%	
Land supply (ha)				**3.2**	
Years worth of supply available				**2.9**	**2.6**

Source: URS Calculations

The table shows that total annual floorspace demand in Kidlington is 4,864 sq m. By applying our assumed plot ratios this equates to an annual average land demand of 1.1 ha. Current land allocated for employment in Kidlington is estimated at 3.2 ha. This land allocation equates to 2.9 years worth of historic demand in Kidlington.

When an allowance is made for non-B1/B2/B8 demand is added in annual average demand is 1.2 ha and the stock of allocated land represents 2.6 years worth of demand.

In addition Section 8.8 outlined information on the availability of existing stock and the rate of demand for new and second hand space. This information suggests that there could be up to an additional 6.4[20] years of already available space in Kidlington. In total this suggests there is between 9.0 and 9.3 years worth of supply in Kidlington.

Even without an allowance for non-B1/B2/B8 demand the stock of years worth of land supply is substantially less than what could be taken as a reasonable stock of allocated land to have for a development plan framework.

[20] Kidlington Average Annual Take-up 3,954 sq m. Available Floorspace in Kidlington 34,096 sq m. Assume around 25% of total stock is no longer suitable for modern industry as too old therefore 25,572 sq m of available floorspace in Kidlington.

9.5. Demand and Supply in Cherwell

Table 9-4 presents our analysis of supply and demand for employment land in Cherwell District. This assumes average past demand rates continue in future.

Table 9-4 Supply and Demand Analysis for Cherwell District

	Office	Industry	Warehouse	Total	Total inc allowance for non-B1/B2/B8
Assumed demand (sq m per annum)	6,099	7,492	13,927	**27,519**	
Equivalent annual land demand (ha)	1.8	1.9	2.8	**6.5**	7.2
% split of land demand	28%	29%	43%	100%	
Land supply (ha)				**95.8**	
Years worth of supply available				**14.6**	**13.1**

Source: URS Calculations

The table shows that total annual floor space demand in Cherwell is 27,519 sq m. Using our assumed plot ratios this equates to an annual average land demand of 6.5 ha. Current land allocated for employment in Cherwell is estimated at 95.8 ha. (This figure assumes that an equivalent of only 3.5 ha of land will be available at the airfield site rather than the 9 ha area of the site as development will be restricted to existing buildings). This land allocation equates to 14.6 years worth of historic demand in Cherwell. When an allowance is made for non-B1/B2/B8 demand is added in annual average demand is 7.2 ha and the stock of allocated land represents 13.1 years worth of demand.

In addition Section 8.4 outlined information on availability of existing stock and the rate of demand for new and second hand space. This information suggests that there could be up to an additional two[21] years of already available space. In total this suggests there is between 15 and 17 years worth of supply.

Section 6.5 of this report provided a breakdown between available development sites that were designated for employment development in the non-statutory Cherwell Local Plan 2011 and those that were identified via the URS 2005 employment land survey. Table 6-5 presents the designated sites which total 73.5 ha of developable land and Table 6-6 presents the sites identified in the survey, which total 21.3 ha of developable land. Using the same calculations as in Table 9-4 above, the 14.6 years worth of supply in Cherwell

[21] Average Annual take-up in Cherwell 33,688 sq m. Available on the market 105,969 allowing for churn. Assume around 25% of total stock is no longer suitable for modern industry as too old.

District is made up of 11.3 years of supply from currently designated sites and 3.3 years of supply from development sites identified in the survey.

9.6. Demand and Supply in Oxford-Bicester-Kidlington

In addition to meeting the land demanded by Cherwell District, Kidlington and Bicester's land allocations play another important role by supplying land to the Oxford-Bicester-Kidlington sub-regional market area. As discussed in Section 7, land supply in Oxford City is constrained and under intense pressure from other uses. Bicester and Kidlington have land available to absorb some of the excess demand for employment premises fuelled by overflow from Oxford City.

Table 9-5 presents our analysis of supply and demand for employment land in the Oxford-Bicester-Kidlington sub-regional market. This assumes average past demand rates continue in future.

Table 9-5 Supply and Demand Analysis for Oxford-Kidlington-Bicester

	Office	Industry	Warehouse	Total	Total inc allowance for non-B1/B2/B8
Assumed demand (sq m per annum)	14,443	20,956	13,460	48,859	
Equivalent annual land demand (ha)	4.4	5.2	2.7	12.3	13.5
% split of land demand	36%	43%	22%	100%	
Land supply (ha)				51.6	
Years worth of supply available				**4.2**	**3.8**

Source: URS Calculations

The table shows that total annual floor space demand in the Oxford/Bicester/Kidlington area is 48,859 sq m. Using our assumed plot ratios this equates to an annual average land demand of 12.3 ha. Current land allocated for employment in the area is estimated at 51.6 ha. This land allocation equates to only 4.2 years worth of historic demand in the area.
When an allowance is made for non-B1/B2/B8 demand is added in annual average demand is 13.5 ha and the stock of allocated land represents 3.8 years worth of demand.

In addition Section 6.5 outlined information on availability of existing stock and the rate of demand for new and second hand space in Cherwell. We do not have equivalent information for Oxford and it is likely that floor space is more restricted in Oxford than for Cherwell. We suggest that an average of 1.5 years worth of supply of floor space is a reasonable assumption. This suggests there is between 5.3 and 5.7 years worth of supply.

Even without an allowance for non-B1/B2/B8 demand the stock of years worth of land supply is substantially less than what could be taken as a reasonable stock of allocated land to have for a development plan framework.

9.7. Supply and Demand in Oxfordshire

Table 9-6 presents our analysis of supply and demand for employment land in Oxfordshire County. This assumes average past demand rates continue in future.

Table 9-6 Supply and Demand Analysis for Oxfordshire County

	Office	Industry	Warehouse	Mixed	Total	Total inc allowance for non-B1/B2/B8
Average annual demand (sq m)	28,100	32,425	36,375	7,050	103,950	
Equivalent annual land demand (ha)	8.5	8.1	7.3	1.4	25.3	27.8
% split of land demand	34%	32%	29%	6%	100%	
Land supply					169.3	
Years of supply					**6.7**	**6.1**

Source: URS Calculations

The table shows that total annual floorspace demand in Oxfordshire County is 103,950 sq m. Using our assumed plot ratios this equates to an annual average land demand of 25.3 ha. Current land allocated for employment in the County is estimated at 166.8 ha. This land allocation equates to 6.7 years worth of historic demand in the County.

When an allowance is made for non-B1/B2/B8 demand is added in annual average demand is 27.8 ha and the stock of allocated land represents 6.1 years worth of demand.

In addition Section 6.5 outlined information on availability of existing stock and the rate of demand for new and second hand space in Cherwell. We do not have equivalent information for Oxfordshire and for example it is likely that floor space is more restricted in Oxford than for Cherwell. We suggest that an average of two years worth of supply of floor space is a reasonable assumption. This suggests there is between 8.1 and 8.7 years worth of supply.

Even without an allowance for non-B1/B2/B8 demand the stock of years worth of land supply is substantially less than what could be taken as a reasonable stock of allocated land to have for a development plan framework.

9.8. Summary

Our analysis has set out the land demand for each of Cherwell's main market towns. When assessed on its own Bicester's current land allocations, at current levels of demand, would be enough to keep the market running efficiently throughout the length of Cherwell's new Local Plan 2006-2026, and provide a buffer at the end of the plan period to allow the market to continue to operate while a new plan is being prepared and adopted.

When assessed individually, land supply in Banbury and Kidlington would fall short of demand if future demand remains at current levels. Current allocations in Banbury result in 13.4 years worth of supply and in Kidlington there is presently 2.9 years worth of supply of land. However, as discussed in Section 7, when assessing employment land it is not appropriate to assess each town as a separate market as demand is likely to be distributed throughout various interactive sub-regional markets. In the case of Cherwell, it is likely that as land becomes more constrained in Kidlington, investors would look towards Bicester to meet their land requirements. The same would likely happen when supply becomes tight in Banbury though perhaps to a lesser extent due to current perceptions of a separate distinct Banbury market.

Set within the context of District wide demand, Cherwell's current land allocations provide 14.6 years worth of supply based on current levels of demand continuing into the future. Table 9-7 below summarises our key findings with respect to supply of and demand for employment land in Cherwell.

Table 9-7 Summary of Demand and Supply in Cherwell District

Town/District	Available employment land (ha)	Average annual rate of demand (ha)	Supply expressed as years worth of demand
Banbury	47.0	3.5	13.4
Bicester	38.4	1.6	24.0
Kidlington	3.2	1.1	2.9
Cherwell District	94.8	6.5	14.6

Source: URS Calculations

When supply and demand is assessed on a wider scale, such as setting Cherwell District within the whole Oxfordshire market region, our analysis again shows that supply is limited to around seven years. Cherwell's land allocations make up about 56% of known allocations in the County and hence play an important role in employment generating activity for the entire County[22].

[22] These conclusions are subject to the caveats and assumptions mentioned in this report.

10. CONCLUSIONS AND RECOMMENDATIONS

10.1. Conclusions

The principal purpose of this report is to review whether the current allocations of employment land in the Non-Statutory Cherwell Local Plan 2011 is justified and appropriate. The question here is how many years worth of demand should be planned for?

A local plan should allocate sufficient employment land to meet anticipated future demand unless good reasons suggest an alternative approach. Traditionally local plans have covered a ten-year period in which case the land allocations for Cherwell District would be sufficient to meet anticipated demand. However, Cherwell District Council is in the process of producing its new Local Development Framework covering the period 2006 to 2026, a 20-year timeframe.

The URS employment land survey results indicate that Cherwell and its market towns have a stock of premises and land that provides a broad range of choice for investors but some of the property is dated. Changes in the economy and the way businesses operate are presenting new challenges for the Cherwell property market. Modern businesses demand high quality design and a range of size requirements, which may be difficult to find in the current stock. While warehouse and distribution activities have dominated the market in the recent past the Council is looking to diversify the economy and promote innovation and investment in new technology and knowledge-based enterprises.

The supply and demand analysis presented in Section 9 sets out the number of years worth of supply based on past demand trends continuing into the future. The amount of land currently allocated in the Non-Statutory Cherwell Local Plan 2011 combined with land identified through URS' 2005 employment land survey provides 14.6 years worth of supply in Cherwell based on past demand trends, primarily the demand for warehousing space, continuing into the future, which would fall short of the minimum 20 years required to cover the new plan period.

Historically, the greatest demand has been for B8 class use, which takes up large amounts of land but provides relatively few employment opportunities. Cherwell District Council is attempting to change the focus of development to promote more efficient land use and provide more local jobs for residents. Aside from one site in Bicester Park, which remains allocated for B8 class use, all other development sites are designated for B1 and or B2 class use. However, demand for warehousing should not be ignored when it comes to planning future land allocations.

In our recommendations presented below we set out a strategy for the allocation and protection of employment land in the District. The strategy accounts for the Council's economic development objectives while not ignoring past trends in employment land development, provides suggestions for land use allocations of existing sites sufficient to meet demand over the length of the plan period. The site allocations have been developed to provide choice, flexibility and competition.

10.2. Recommendations

Land for Development

Based on the findings of the Cherwell Employment Land Review it is recommended that 89.0 hectares of available developable land be protected for employment generating development in the District. Table 10-1 presents the distribution of land by use class.

Table 10-1 Land Use Distribution

Land Use	Hectares	% of total
B1	28.7	32
B2	32.8	37
B8	27.5	31
Total	**89.0**	**100**

Source: URS, 2006

The number of years worth of supply represented by the land allocations presented above can be estimated by applying the same approach as used in Section 9.

The land allocations set out in Table 10-1 have the potential to provide for 28 years worth of land supply for office space and 20 years worth of land supply for factory space, which would be sufficient to cover the new LDF period. The 27.5 ha allocated for warehousing development provides for ten years worth of supply. While not covering the length of the plan period it is sufficient to meet the immediate demand and is in-line with the Council's economic development strategy.

Table 10-2 Years Worth of Supply

	B1	B2	B8
Total land for development (ha)	28.7	32.8	27.5
Plot Ratio	0.6	0.45	0.5
Potential Built out Floorspace (sq m)	**172,200**	**147,600**	**137,500**
Average Annual Demand (sq m)	6,099	7,492	13,927
Years worth of supply	**28**	**20**	**10**

Source: URS, 2006

B1 Land Use

It is recommended that 28.7 hectares of available employment land be designated for B1 office development. This will provide for 28 years worth of supply based on standard plot ratios and historic demand trends. This will cover the length of the new LDF and provide a buffer to allow the market to operate efficiently while a new plan is being prepared and adopted. Plans for the former Cattle Market area and Banbury Regeneration Area will also provide some additional B1 accommodation as part of mixed-use schemes. The land allocations are broken down as follows:

- Banbury 8.3 ha
- Bicester 14.7 ha
- Kidlington 2.1 ha
- Rest of Cherwell 3.6 ha

B2 Land Use

It is recommended that 32.8 hectares of available employment land be designated for B2 general industrial development. This will provide for 20 years worth of supply based on standard plot ratios and historic demand trends. This is less than the length of plan period, however, based on the assessment of available floorspace on the market presented in Table 8-6 and the opportunity to refurbish and intensify uses at existing sites, it is likely that the existing supply and allocations will be sufficient to meet demand. Land allocations are broken down as follows:

- Banbury 17.3 ha
- Bicester 12.5 ha
- Kidlington 1.1 ha
- Rest of Cherwell 1.9 ha

B8 Land Use

It is recommended that 27.5 hectares of available land be designated for B8 warehousing and distribution development. This will provide for 10 years of further B8 supply based on standard plot ratios and historic demand trends. While not covering the length of the plan period it is sufficient to meet the immediate demand while working towards meeting the Council's objectives to provide less warehousing and more high quality business space. Land allocations are broken down as follows:

- Banbury 17.7 ha
- Bicester 9.8 ha
- Kidlington 0.0 ha
- Rest of Cherwell 0.0 ha

Existing Business and Industrial Use Area

Based on the findings of the Cherwell District Employment Land review it is recommended that all premises and land currently in B class use should remain allocated and be protected for employment generating activity.

10.3. Site Specific Allocations

Our recommendations for the future land uses attributed to each site are presented in Table 10-3 below. They are comprised of some single use sites but many sites are allocated a mix of employment uses to allow some flexibility and to balance overall provision. Specific allocations should also help the Council to defend sites.

Table 10-3 Development Site Land Use Allocations

Ref no	Name	Proposed LDF Allocation	Site Area (ha)	Land Allocations (ha)		
				B1	B2	B8
BA1.1	Banbury Cross Business Park	B2/B8	3.3	0	1.7	1.6
BA1.2	Banbury Cross Business Park	B1	2.5	2.5	0	0
BA1.3	Banbury Cross Business Park	B2/B8	1.0	0	0.5	0.5
BA1.4	Banbury Cross Business Park	B8	1.0	0	0	1.0
BA2	Land North of Overthorpe Road	B1/Hotel Development	5.8	2.8	0	0
BA3	Land South of Overthorpe Road	B2/B8	21.0	0	7.0	14.0
BA7.1	Marley Industrial Estate	B2	0.5	0	0.5	0
BA7.2	Marley Industrial Estate	B2	0.02	0	0.02	0
BA10.1	Beaumont Industrial Estate	B8	0.6	0	0	0.6
BA10.2	Beaumont Industrial Estate	B2	0.1	0	0.1	0
BA11	Alcan Site	B1/B2	10.6	3.0	7.6	0
BA12	Alcoa Site	Release	0.9	0	0	0
BA14	West of Hardwick Farm	Release	0.7	0	0	0
B1.1	Bicester Park	B8	0.8	0	0	0.8
B6	Launton Road	B1/Mixed-use	3.4	2.0	0	0
B7	Gavray Drive	B1/B2/B8	14.7	2.7	5.0	7.0
B8	Bicester Airfield	B1/B2	3.5	2.0	1.5	0
B9	Oxford Road	B1/B2/B8	16.0	8.0	6.0	2.0
K3.1	West Side of Canal	B2	0.6	0	0.6	0
K3.2	West Side of Canal	B1	0.8	0.8	0	0
K4.1	Motor Park	B2 or car showroom	0.5	0	0.5	0
K5.1	Oxford Spires	B1	0.9	0.9	0	0
K5.2	Oxford Spires	B1	0.4	0.4	0	0
R3	Brymbo Works Ironworks	Release	0.7	0	0	0
R4	Banbury Business Park	B1	3.6	3.6	0	0
R5	PA Turneys	B2	1.9	0	1.9	0
			Total	**28.7**	**32.8**	**27.5**

Source: URS, 2006

10.4. Employment Land Strategy

Based on the findings presented in this report we propose the following employment land strategy that includes guidance on clusters that could be improved, desired employment designation and proposals for development sites identified in the survey. We also identify three sites that could be released for alternative use.

Banbury

BA1 Banbury Cross Business Park/Wildmere Industrial Estate, Banbury
Banbury Cross Business Park is strategically located just off Junction 11 of the M40. Further expansion of the site is constrained by its existing boundaries (M40 on the east, River Cherwell to the north, the rail line to the west and Hennef Way to the south). Future development depends on the few remaining development sites and the regeneration of existing sites.

The south west corner (near to the rail line) has benefited from some recent new developments, particularly the new Innovation Centre, and the momentum for good quality design should carry on throughout the park and further development at the gateway to the park will set the standard and could be the impetus for further regeneration throughout the park.

There are four available development sites within the cluster. Site BA1.1 is a large site in the northwest corner of the cluster. It would be well suited to B2/B8 development and could serve to rejuvenate the more peripheral part of the cluster.

Site BA1.2 is a large corner site that would offer a high profile location attractive to a number of different users. The site should be development for B1 use of a high quality design standard that would complement the surrounding uses and bolster the gateway nature of the site both to the business park and to the town itself.

Site BA1.3, currently occupied by a large derelict warehouse with ancillary offices, offers an opportunity to rejuvenate the southern end of the cluster, which as the gateway into the cluster has become rundown and neglected. The site would suit a B2/B8 development of high quality design and landscaping to supplement the high quality buildings on the east side of the entrance to the cluster.

Site BA1.4 is the remaining allocation of a larger site that is now mostly developed. It is recommended for B8 development as it has excellent connections to the M40 and would supplement the existing uses on the adjacent sites.

Future development in Banbury Business Park should be strictly limited to employment use and build on some of the new high-tech occupants such as Zafire Solutions, to provide a good quality cluster offering a range of premises to accommodate all uses including B8 to take advantage of existing demand for B8 space and the clusters strategic, edge-of-town location.

However, there may be some scope to provide some services and facilities for employees, especially eating facilities, as employees currently need to leave the park at lunchtime or for business entertaining purposes. The following policy wording is suggested for consideration with regards to this large strategic employment area:

Small-scale leisure, eating and shopping facilities (generally less than 200m^2 gross) will be considered as an exception to the normal employment land policies, subject to the following:

a) The facility is intended primarily to meet the needs of workers in the vicinity.
b) It does not attract significant levels of visitor traffic into the area, or exacerbate existing traffic conditions.

BA2 Land North of Overthorpe Road, Banbury

Part of this site currently has planning permission granted for hotel development together with ancillary health and fitness facilities for the use of hotels guests only. The remainder of the site is considered appropriate for B1 of high design standard and landscaping. The site is in a prominent location and in conjunction with developments at Banbury Cross Business Park across the road could provide a high-quality gateway to the town for those approaching from the M40. Development of this site would complete the corridor of employment uses that runs along Ermont Way down to Overthorpe Road.

BA3 Land South of Overthorpe Road, Banbury

This site is currently allocated in the Non-Statutory Cherwell Local Plan for employment development under Policy EMP2. It is the largest available designated site in the District and could provide a substantial number of jobs if developed out. It is well suited for employment development over other uses with it being in close proximity to established employment areas. The site is bound by Thorpe Park and Echo Park and by the M40 running along the eastern boundary.

It is recommended that this site be designated for future B2/B8 employment development to supplement the existing employment uses in the area. Development of this site would provide a good mix of employment uses completing a large employment corridor strategically located on the edge of town.

It is noted that the Highways Agency is concerned about increased levels of traffic if the development was built out for high-density employment. In light of these concerns a full transport impact assessment would need to be submitted with any proposals for development.

Similar to Banbury Cross Business Park it may be advisable to allow for the provision of some employee services on this site to provide for the wider employee population at Thorpe Park and Echo Park. Employee facilities and amenities are lacking in this area which likely results in increased car trips.

BA4 Thorpe Park, Banbury

Thorpe Park is an active business area supplying a range of sites and premises for a variety of business activities. Some recent developments have improved the character of the park but further measures should be taken to improve the general environment as the current road infrastructure, sidewalks and upkeep of the grounds has been neglected leading to a somewhat rundown environment.

It is recommended that the site be protected for employment use and a regeneration strategy be developed to improve the overall quality of the environment.

BA5 Cattle Market Area (Banbury Regeneration Area)

This cluster is subject to plans set out in the Non-Statutory Cherwell Local Plan for the Banbury regeneration area. Employment elements will include those compatible with residential use, predominantly B1 and D1 on ground floor of residential led buildings.

BA6 Tramway Industrial Area (Banbury Regeneration Area)

This cluster is subject to plans set out in the Non-Statutory Cherwell Local Plan for the Banbury regeneration area. Employment elements will include those compatible with residential use, predominantly B1 and D1 on ground floor of residential led buildings.

BA7 Marley Industrial Estate/Southam Road, Banbury

This cluster is located near to the town centre, which has resulted in a number of competing uses being established on the site such as the Halfords and B&Q retail sheds and other retail use. However, the southern end of the site is still dominated by Fine Lady Bakeries and there are a variety of commercial activities still operating on the site that should be maintained and permitted to grow. It is recommended that this site be protected for employment generating activities and further encroachment by non-employment activities should be discouraged.

There are two development sites identified within the cluster (BA7.1 and BA7.2) that are recommended for B2 development in keeping with the existing activities in the cluster.

The cluster could benefit from an initiative to improve the general environment, roads and landscaping. It is in a good location to capitalise on its proximity to the town centre and to limit additional trip generation.

BA8 Kraft, Banbury

This large single-occupier site is near to the town centre and opposite Banbury Cross Retail Park. Developments on the site would be subject to the management of Kraft and it is unlikely at this time to be considered for any other use.

BA9 Banbury Cross Retail Park, Banbury

This cluster is a heavily occupied and active retail cluster. However, Beaumont Industrial Estate surrounds the retail area and care should be taken to resist any proposals for further retail expansion into the employment area.

BA10 Beaumont Industrial Estate, Banbury

This cluster provides a range of premises and site sizes for a variety of business activities. Some recent developments at the northern edge of the cluster have improved the stock of premises on offer along with a large-scale office refurbishment along the Southam Road frontage at the entrance to Beaumont Road. There appears to be a small cluster of high-tech companies occupying the estate and this should be nurtured and encouraged to grow in that capacity.

Two small sites (BA10.1 and BA10.2) were identified for potential development, which are currently occupied by derelict buildings. These sites could be redeveloped for B8 and B2 use respectively and serve to regenerate a less active corner of the cluster.

It is recommended that the cluster be protected for employment use and any encroachment of retail activities from nearby Banbury Cross Retail Park should be discouraged.

BA11 Former Alcan Laboratories, Banbury

This site is currently being marketed with the building/laboratory available for mixed commercial opportunities. It is recommended that the site boundary be extended northward towards the roundabout with Southam Road at Hardwick Farm. The new boundary would provide a hard edge to the employment activity and would rationalise the boundary with the activity at Alcan across Southam Road.

Proposed development for this site would be for B1/B2 use of good quality design that could act as a gateway to the town for those approaching from the north on the A423 from Coventry and provide a buffer to the proposed housing site to the west.

BA12 Alcan/Alcoa, Banbury

This large single occupier site should be protected for employment use. However, should Alcoa decide to vacate the site at some point in the future it would be unlikely for such a large dedicated site to be taken up by another single occupier. Redevelopment of the existing structures would need to accommodate a range of premises size and business activities primarily B2 to attract a range of occupiers.

BA 13 Hella, Banbury

This large single occupier site should be protected for employment use. However, should Hella decide to vacate the site at some point in the future it would be unlikely for such a large dedicated site to be taken up by another single occupier. Redevelopment of the existing structures would need to accommodate a range of premises size and business activities primarily B2 to attract a range of occupiers.

Bicester

B1 Bicester Park, Bicester

Bicester Park has largely been developed out as a distribution cluster with a number of large-scale occupiers such as Excel, Budweiser and Fresh Direct. It has excellent links to the motorway and is in a good edge of town location. It is recommended that the remainder of the site be permitted for B8 use if proposals come forward.

B2 Telford Road Industrial Estate, Bicester

Telford Road Industrial Estate comprises a mix of commercial uses ranging from small-scale manufacturing and high-tech firms to aggregates production. The estate is well occupied and active however there were a number of vacant units available at the time of the survey. The southern end of the site has some retail elements and further incursion should be discouraged. Some of the premises appeared to be in poor condition, road infrastructure was well maintained but the overall environment could do with some improvements. It is recommended that a modernisation strategy be developed for the cluster in order to attract new occupiers.

B3 Chaucer Business Park, Bicester

Chaucer Business Park provides a mix of warehouse/distribution and small industrial premises. Large occupiers include Brita and BGP Group. Brita moved in 2004 to a new high quality building housing its water filtering operations and BGP maintains a good quality warehouse and printing factory. The British Bakels bakery occupies about a third of the site at the southern end. No further developable land was identified as part of the survey. It is recommended that Chaucer Business Park be protected for employment use only.

B4 Murdoch Road (Launton Business Centre), Bicester

Launton Business Centre appears to be in a period of transmission. The Royal Mail delivery office was the dominant occupant of the site but appeared to be downsizing their premises requirements with a number of their units for let at the time of the survey. There was a row of 1950s office blocks being refurbished but it was unclear as to what the end use would be. The units on the left hand side of Murdoch Road appeared to be office premises converted from townhouses.

It is recommended that the cluster be protected for employment use with the potential for release of the western edge past the slip road that runs up the middle of the cluster. Future development and modernisation should be focused on those sites and premises nearer to Launton Road to maintain a consistent employment corridor with neighbouring Chaucer Business Park, Telford Road Estate and Wedgewood Road Estate with Launton Road acting as the main feeder road.

B5 Wedgewood Road, Bicester

The Wedgewood Road cluster is an active and well-occupied business area and there appeared to be an automotive cluster developing there. The premises and general environment appeared to be in good condition and there were no noted bad neighbour uses that were impacting on the adjacent residential areas to the west. It is recommended that this area be protected for employment use and alternative uses should be discouraged.

B6 Launton Road, Bicester

The Launton Road site was investigated as part of the employment land survey to determine the appropriate local plan designation. Upon review, it is recommended that the 3.4 hectare site remains designated for mixed-use development as it is in the Non-Statutory Cherwell Local Plan but provides for an element of B1 office development as part of any scheme brought forward. It is well suited to mixed-use development as it is close proximity to existing retail activity across the street, it is also adjacent to existing housing and on one of the main routes into Bicester town centre. A high-quality mixed-use scheme could rejuvenate the derelict corner site. Development should be in accordance with Housing Policy H1b and Town Centre, Urban Renewal and Local Shopping Policy S17b.

B7 Gavray Drive, Bicester

This is a large vacant site to the north of Gavray Drive in Bicester. The site benefits from good strategic road network access and relevant infrastructure is already in place. It is adjacent to an existing successful employment area at Bicester Park. The entrance to Gavray Drive is nearer to the junction with the A41 than Bicester Park's so would have an advantage over Bicester Park with regards to trip times.

It is recommended that this site be protected for B1/B2/B8 employment generating activities focusing on providing a high quality business park environment to attract the hi-tech and science sectors desired for Bicester but also providing an element of warehousing and distribution space on a well connected site.

B8 RAF Bicester

Surveyors were unable to gain access to the site. Based on the Council's objectives it is recommended that 3.5 ha of land be protected for employment generating development comprising the redevelopment of existing structures for B1/B2 class activities. If further development in permitted on site this could represent a windfall site for the Council.

B9 Oxford Road, Bicester

Besides Gavray Drive this is the only other large potential development site remaining in Bicester. This site has excellent strategic road access located at the junction of the A34 and A41. The site is within the boundary of the proposed South West Bicester Urban Extension and could provide a significant element of employment providing local jobs for potential new residents.

It is recommended that 16 hectares of the site be protected for employment generating development (B1/B2/B8). A high quality mixed-use development would enhance the sustainability aspects of the town and its future population growth particularly being within the proposed urban extension. The sites proximity to the town centre would also reduce the need for travel. The site would suit a high quality B1 scheme aimed at attracting businesses that outgrow Bicester's Innovation Centre, which is in-line with the Council's strategic objectives. An element of B2 light industrial use could also be appropriate along the southeast boundary and B8 development would be appropriate to take advantage of the sites good strategic road access.

B10 Station Approach

This site is currently used for open storage and recycling of construction materials. It is adjacent to McKay Trading Estate, which is a good quality and well-occupied business estate. The site is within walking distance to the town centre and the train station which makes it suitable for a mixed-use development incorporating an element of B1 employment use along with some residential and open space provision which is in-line with the Council's objectives.

B11 DSDC Bicester

Surveyors could not gain access to this site. It is assumed that any future development would be subject to the MoD. If this site were to become available it would be a significant land windfall for the District and plans would need to be developed carefully and in cooperation with all parties involved.

Kidlington

K1 Cherwell Business Park, Kidlington

Cherwell Business Park is well occupied and provides an active business environment for a range of business activities. It is, however, getting somewhat rundown and in particular, the internal road infrastructure is in need of upgrades. It is recommended that this site be protected for employment use with a view to implement regeneration strategy to upgrade the overall environment and modernise some of the more outdated premises in order to continue to attract new occupants particularly in the high-tech and research sectors coming out of Oxford.

K2 Station Field Industrial Park (Langford Locks)

New developments on this site include Oxonian Park, a high specification industrial and warehouse development, which is approximately 50% let. The park has the benefit of excellent internal road infrastructure, dedicated car parking and high quality landscaping. The standard of development in this area is high with Kingerlee Joinery occupying another high quality building within the cluster. Some recent office developments at Langford Park add to the mix of premises available and further developments are being advertised.

It is recommended that this cluster be protected for employment generating development. Schemes should be of a high quality in order to maintain the quality of environment attractive to modern businesses.

K3 Langford Business Park (West side of Canal)

Langford Business Park has seen some recent new developments that have increased the standard of development for the area along Langford Road. The entrance to the cluster has developed into a high quality gateway with a landmark building marking the entrance to the cluster heading towards Langford Locks. There are two potential sites remaining for development, sites K3.1 and K3.2, which are recommended for B2 and B1 use respectively.

It is recommend that the cluster be protected for employment generating development of a high quality design that will complement existing use and enhance the quality of the environment.

K4 Oxford Motor Park, Kidlington

This site is primarily used for car retail showrooms with some car repair activities undertaken on site. There is one remaining potential development site available on the western boundary (K4.1). It is recommended that this cluster be permitted to continue as a retail car showroom cluster with the opportunity to provide some B2 development if proposals come forward for the remaining site.

K5 Oxford Spires Business Park

The cluster is a well-developed high quality office park. There are two potential development site remaining within the cluster which are recommended for B1 use so as not to detract from the campus-like nature of the existing environment. It is recommended that this cluster be protected for employment use.

K6 Yarnton Business Park (Oxford Industrial Park)

High-tech firms have flooded this new development and continue to do so. Magnex Scientific, which makes medical scanners and scientific research systems, has created a manufacturing plant on the site, while Exitech, a laser manufacturer were among the first to take-up the high specification units. The cluster benefits from its excellent road links and its proximity to Oxford, which will enable it to take further advantage of the overspill from Oxford due to land constraints there.

K7 Begbroke Science Park

The Begbroke Science Park is owned and operated by Oxford University. It provides an environment where science and research can work alongside leading industry specialists. It is a unique environment, located in the countryside but only a few minutes from Oxford’s ring road.

It is recommended that this be protected for employment generating development related to its future as a hub for scientific research and industry collaboration.

Rest of Cherwell

R1 Twyford Mill

Twyford Mill is one of the more rural employment areas included in the survey. It is located south of Adderbury on the A4260. The cluster is a mix of light industrial units on the northern half of the site but on the southern half there is the large Fired Earth retail warehouse and carpark.

The light industrial units are in poor condition and the site could be used more efficiently by way of an improved road layout. It is recommended that this site be protected for employment use as it provides a good location for rural employment and is consistent with the Council's policy on rural employment development. Development should be primarily for B1/B2 use and should be a scheme in keeping with the rural nature of the location and existing activities; any further retail development should be discouraged.

R2 Upper Heyford Airfield

The former RAF Upper Heyford airfield site occupies about 505 hectares on the plateau above the Cherwell Valley. The MoD has declared the site as surplus to its requirements and has teamed up with a consortium to manage the site and its development over the next 25 years. Development at the site is subject to recent reviews by English Heritage based on the importance of the site in Britain's 'Cold War' history, and has subsequently been partly designated a conservation area.

Presently, activity on the site is permitted if in accordance with the Council's Short Term Uses SPG. Any further development will need to meet the requirements set out in the Structure Plan Oxfordshire County (2005), which in Policy H2 sets out a framework for development, which includes:

- A new settlement of about 1000 dwellings.
- Necessary supporting infrastructure including a primary school and appropriate community, recreational and employment opportunities.
- Conservation of resources and improvements to landscape and biodiversity.
- The encouragement of walking, cycling and use of public transport rather than travel by private car.
- Improvements to bus and rail facilities and measures to minimise the impact of traffic.
- A scale of development appropriate to the location and surroundings.

Future development will need to be in partnership with all relevant stakeholders with the aim of providing a comprehensive development brief that will guide development over the length of the next plan period (2006-2026).

R4 Banbury Business Park, Adderbury

This is a self-contained cluster to the south east of Adderbury on the B4100 (Aynho Road). It is a campus style office park that has attracted Vodafone, a number of high-tech firms and the North Oxfordshire PCT. Further development was underway at the time of the survey. It is recommended that this site be protected for B1 employment generating development to complement the existing uses and provide a good quality out of town office park servicing some of the more rural areas of the District.

R5 P.A. Turney Site and Vermont, Weston-on-the-Green

These two sites, adjacent to Weston Business Park, form a small corridor of employment activity out in the countryside. The P.A. Turney site, to the north of Weston Business Park, is occupied by Kelberg Trailers and Trucks. Weston Business Park provides a good mix of office and light industrial premises and appeared to be well occupied and in good condition. Part of the Vermont site is at the time of writing occupied by a house, and it is suggested that the allocation for redevelopment of this plot to B class use be retained and encouraged to reflect consolidation of the site and to avoid conflicting uses. However, part of the Vermont site has a house and associated outbuildings and should be excluded from the boundary of the employment cluster.

R6 Wykham Mill, Bloxham
This site appears to be serving a purpose providing a range of small low-grade light industrial units for rural business activities. It is recommended to protect the cluster for employment generating development in order to provide a more cohesive business cluster. At the time of the survey refurbishment was underway on some of the existing premises converting into loft-style offices. In agreement with the Council's requirements, development schemes should include comprehensive landscaping to reduce the visual impact of the buildings on the rural countryside.

10.5. Proposals for Release

The following sites are recommended for release to alternative uses:

BA14 Land west of Hardwick Farm (0.7 ha), Banbury
This site is currently allocated in the Non-Statutory Cherwell Local Plan for B1 development. However based on our assessment of employment land in Banbury and across Cherwell District, URS recommends this site 0.7 hectare site be released and should remain undeveloped if possible. The corner site provides a good boundary between the built up area at Alcan and the countryside to the north. Banbury has a number of larger, more appropriate employment sites and potential investment should be focussed towards those sites.

R3 Former Brymbo Ironworks (0.7 ha), Hook Norton
URS visited this site as part of the employment land survey to assess its appropriateness for employment use. It is currently an underused brownfield site with some derelict workshops, some temporary structures, very poor access and visibility and no permanent road infrastructure within the site. The site would need significant improvements if it were to be brought forward for employment and its rural location, limited accessibility and distance to any major centre make it an unlikely prospect for future development.

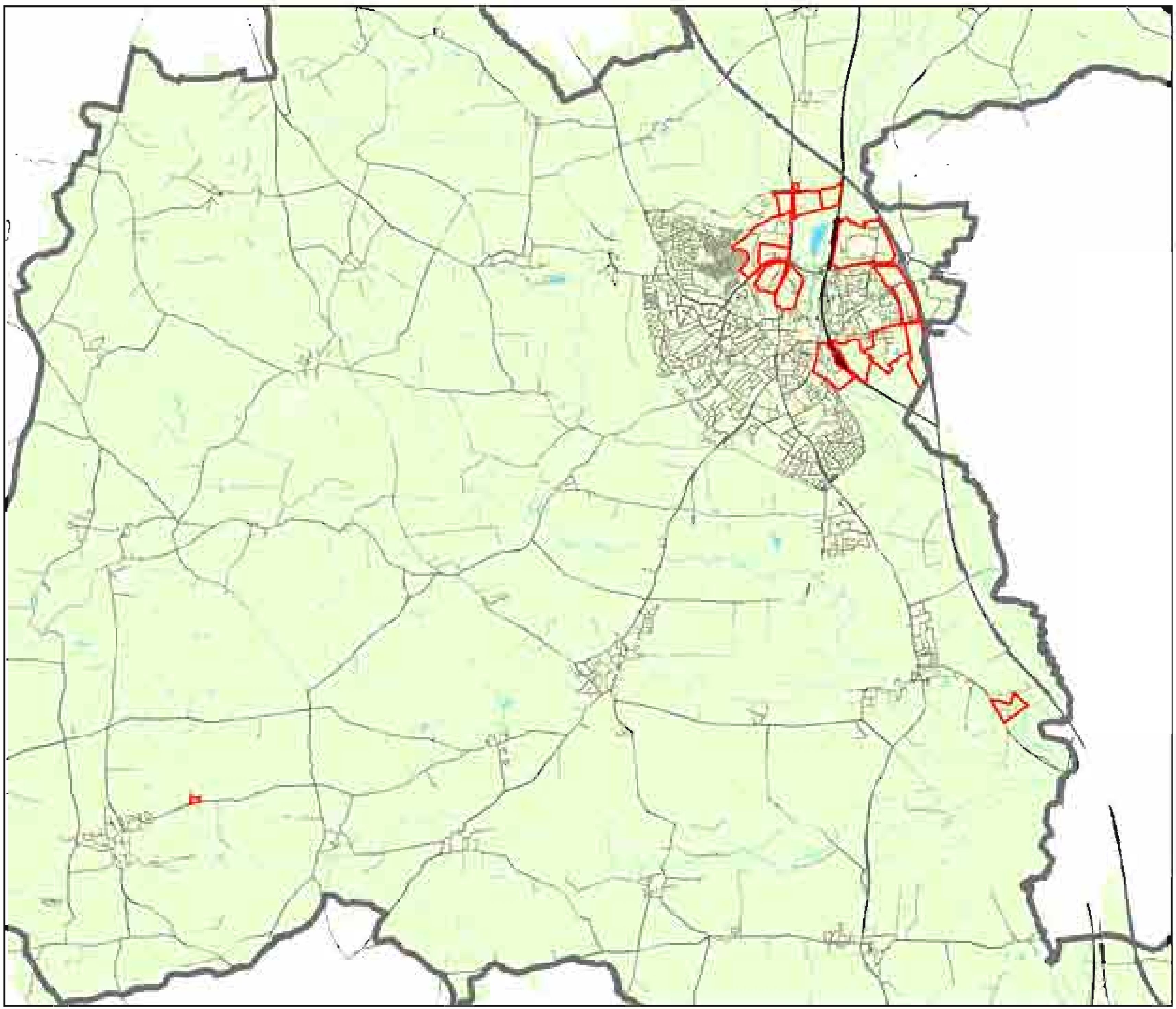
BA12.1 Southern Alcan Site (0.9ha), Banbury
This site was identified through the URS employment land survey but upon further review of its location and proximity to Oxford Canal this site has been removed from the sites that are available for potential employment development.

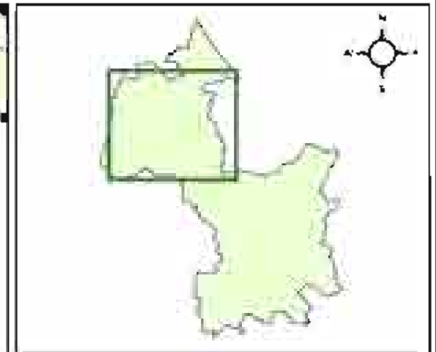
Appendix A - Schedule of Employment Clusters and Overview Maps

Ref.	Cluster Name	Cluster Size (ha)
Banbury		
BA1	Banbury Cross Business Park	48.7
BA2	Land North of Overthorpe Road	22.8
BA3	Land South of Overthorpe Road	21.0
BA4	Thorpe Park	28.5
BA5	Land East Side of Railway – Cattle Market Area (Banbury Regeneration Area)	18.3
BA6	Tramway Industrial Area (Banbury Regeneration Area)	19.8
BA7	Marley Industrial Estate	16.6
BA8	KRAFT	13.9
BA9	Banbury Cross Retail Park	9.9
BA10	Beaumont Industrial Estate	34.4
BA11	Alcan	6.4
BA12	Alcoa	12.6
BA13	Hella	8.2
Bicester		
B1	Bicester Park	15.6
B2	Telford Road	15.4
B3	Chaucer Business Park	12.2
B4	Murdoch Road	13.1
B5	Wedgewood Road	4.8
B6	Launton Road	3.4
B7	Gavray Drive	14.3
B8	RAF Bicester	9.0
B9	Oxford Road	16.0
B10	Station Approach	10.9
B11	DSDC Bicester*	NI
Kidlington		
K1	Cherwell Business Park	5.3
K2	Station Field Industrial Park	8.3
K3	West side of Canal	11.8
K4	Motor Park	4.8
K5	Oxford Spires	6.0
K6	Yarnton Business Park	6.3
K7	Begbroke Science Park	4.8

Rural Cherwell		
R1	Twyford Mill South of Adderbury	TBC
R2	Upper Heyford Airfield*	NI
R3	Hook Norton – Brymbo Works	0.7
R4	Banbury Business Park – Adderbury	4.4
R5	P.A. Turney site	3.2
R6	Wykham Mill	5.4
	Total	**436.6**

Source: URS Survey, 2005
**RAF Upper Heyford and DSDC Bicester are not included in the overall employment land area as it would greatly distort the amount of employment land available in the District. The site is subject to a number of constraints and wider county and regional planning objectives*

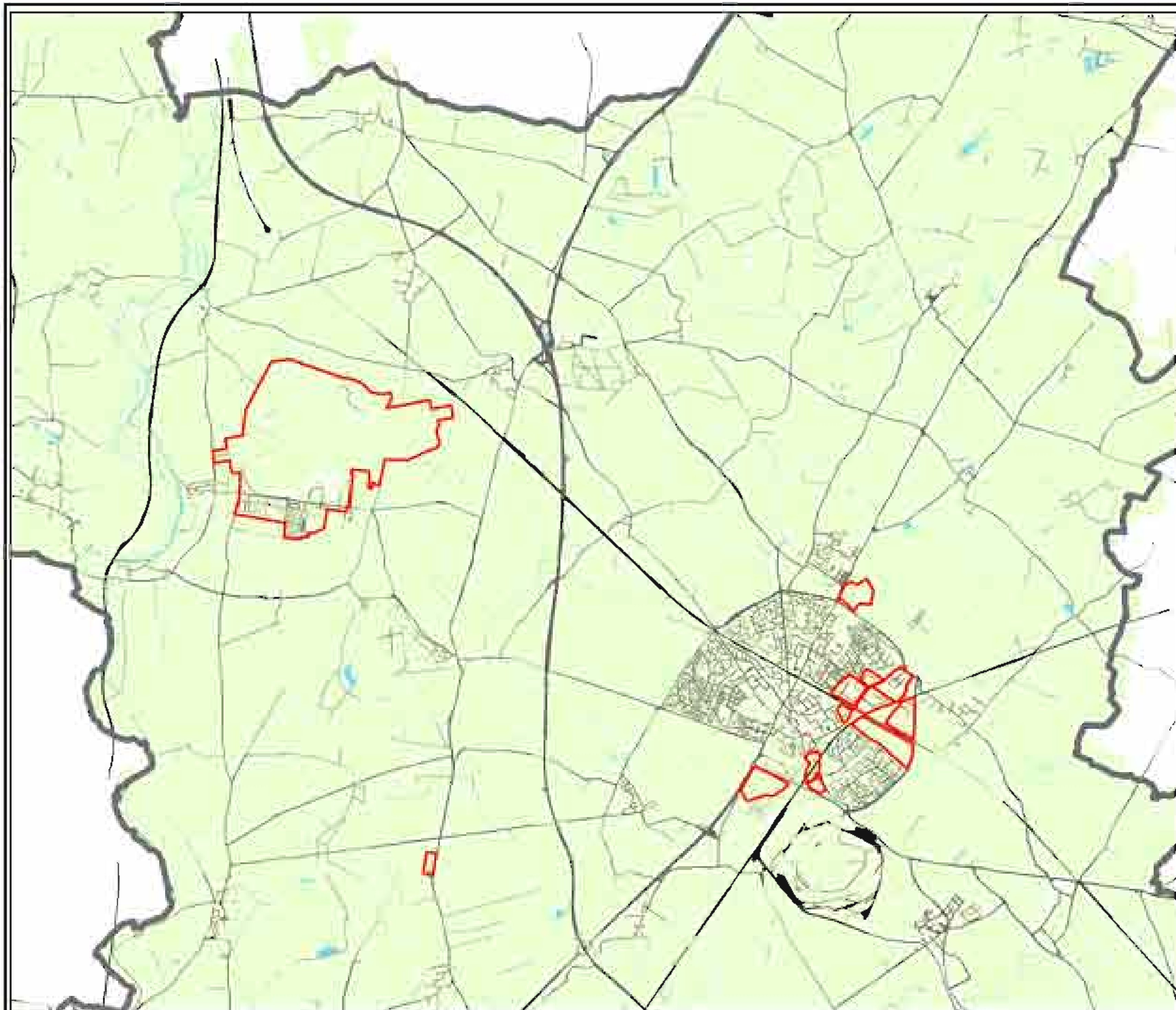


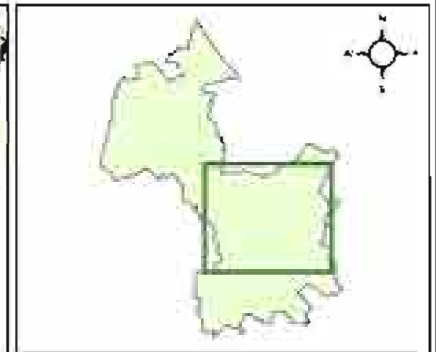


Cherwell District
Employment Land Review

District Map (1 of 3)

URS





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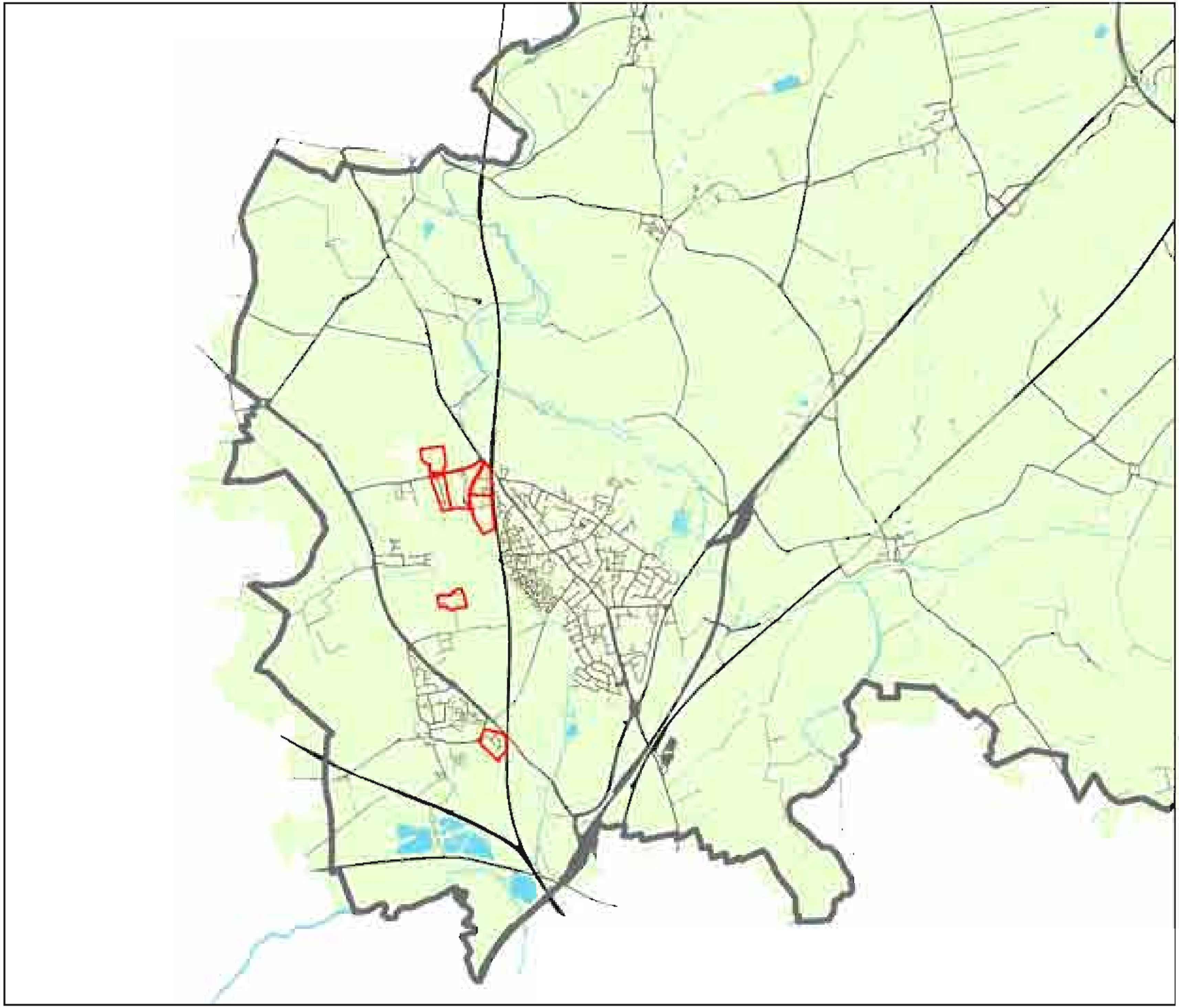
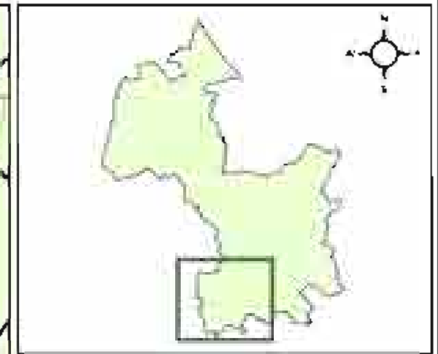
Cluster

Cherwell District
Employment Land Review

District Map (2 of 3)

URS





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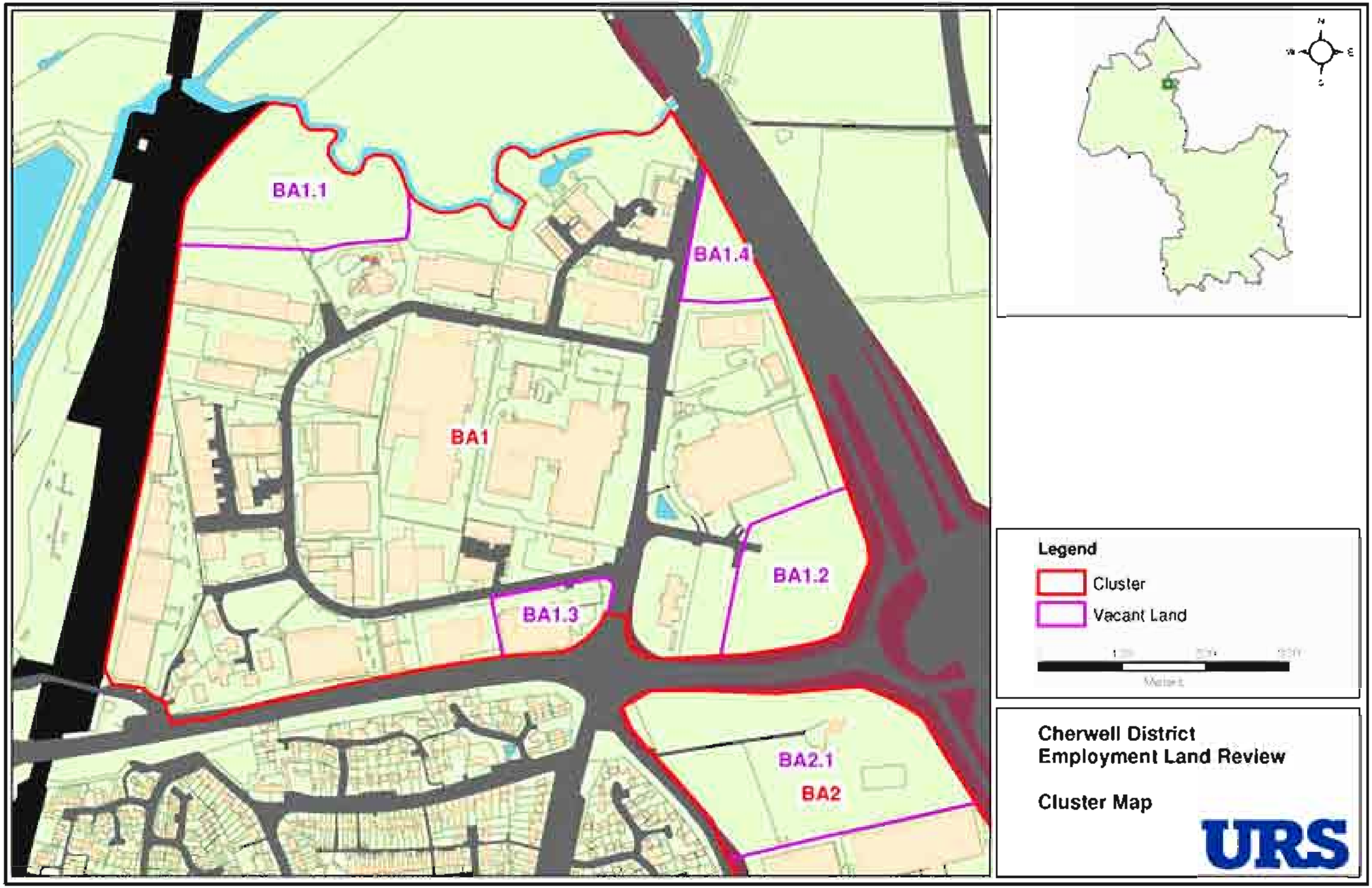
Cluster

Cherwell District
Employment Land Review

District Map (3 of 3)

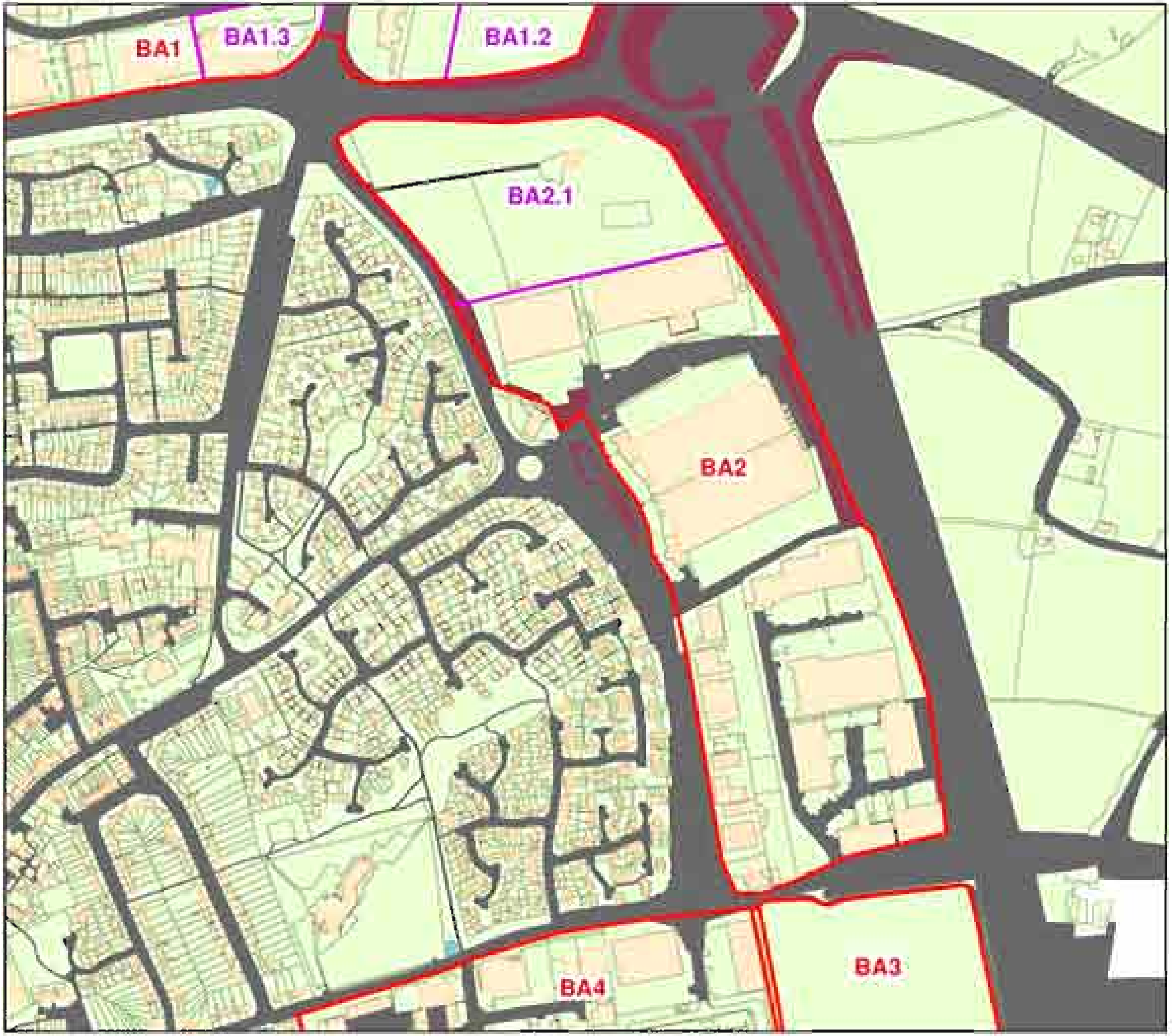
URS

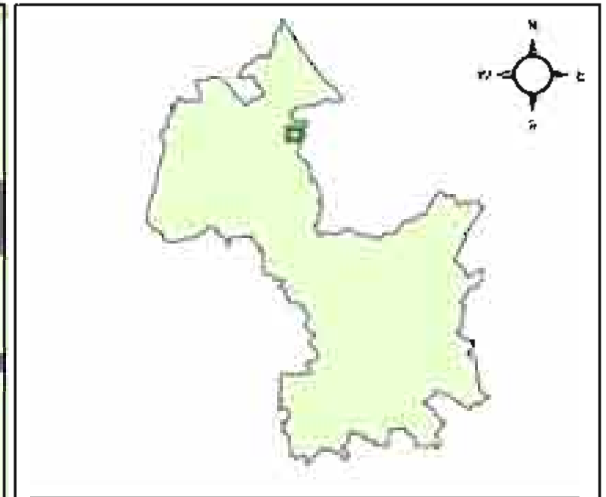
Appendix B - Maps of Employment Clusters



Cherwell District Employment Land Review

Cluster Map





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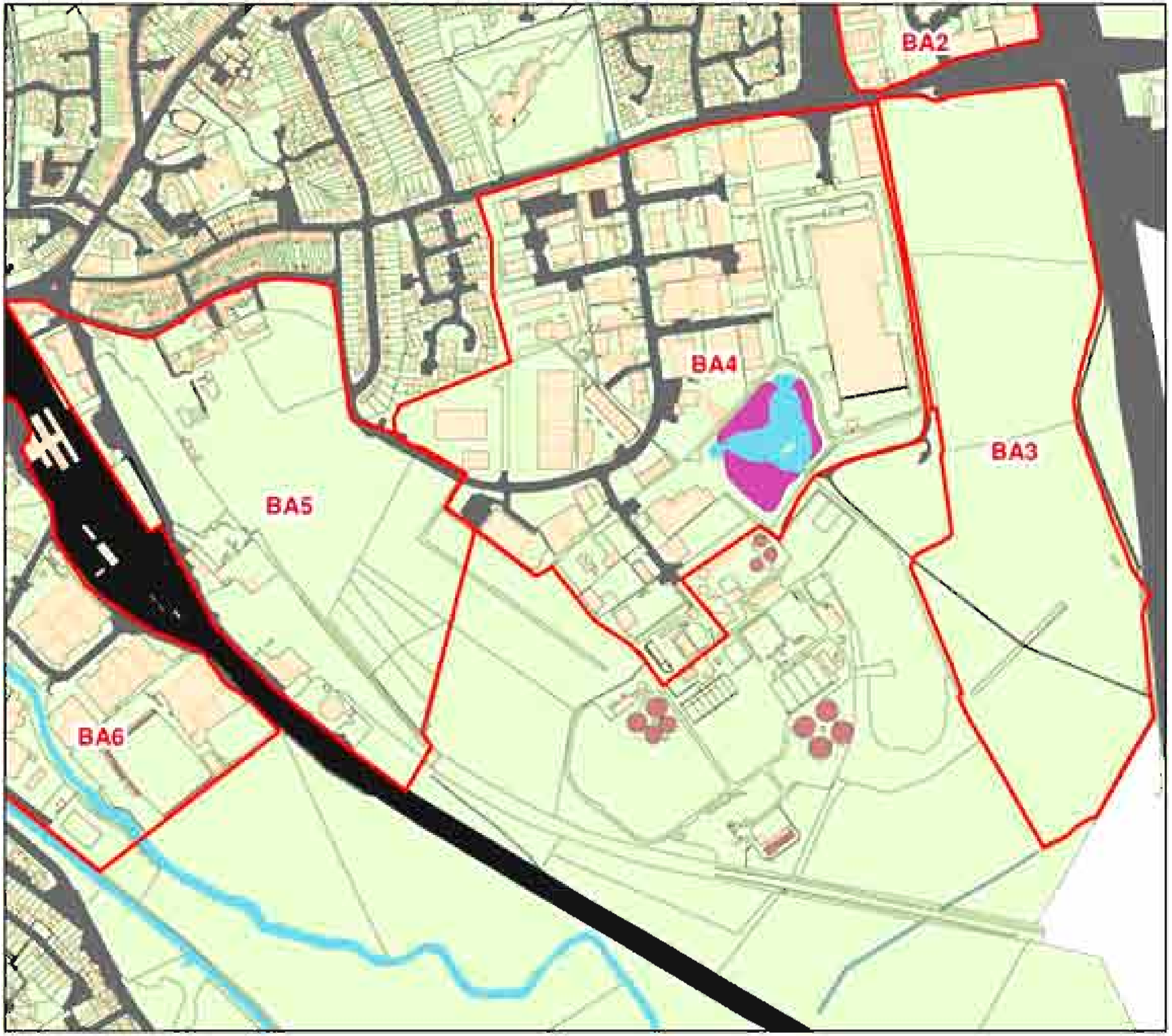
- Cluster
- Vacant Land

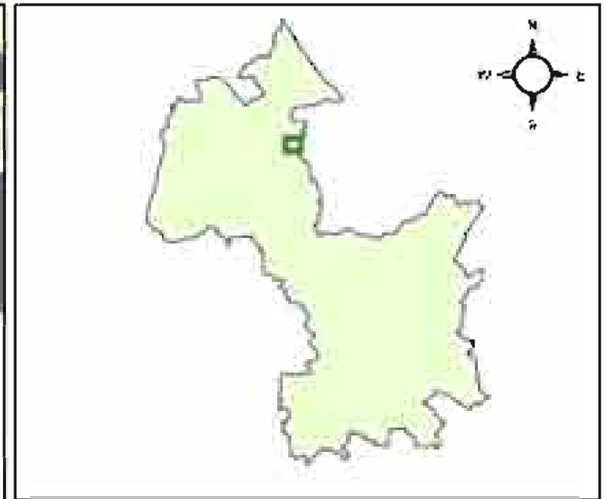
Metres

Cherwell District
Employment Land Review

Cluster Map

URS





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Cluster

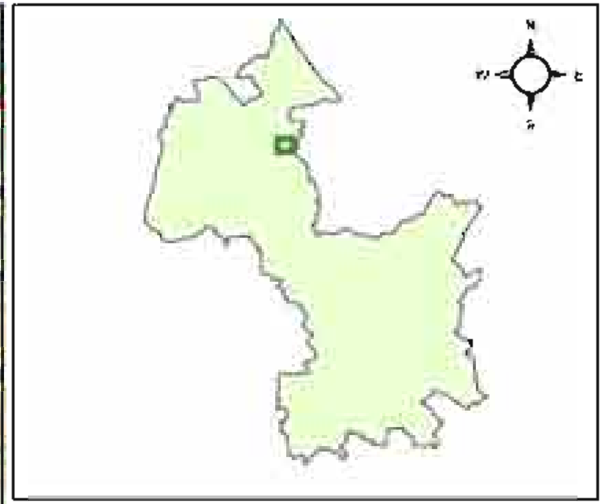
Vacant Land

0 100 200 300 400

Metres

Cherwell District
Employment Land Review

Cluster Map



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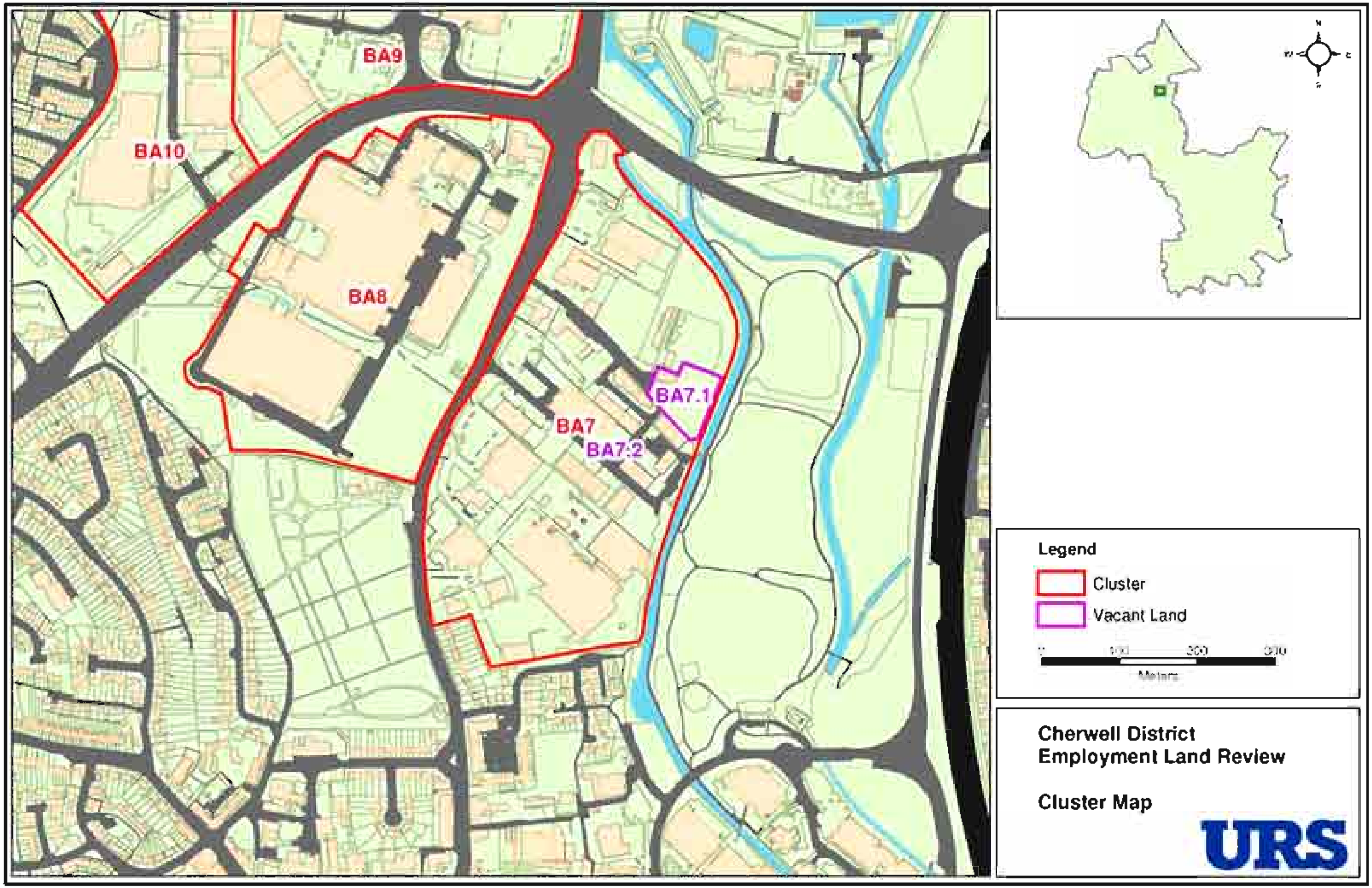
Cluster

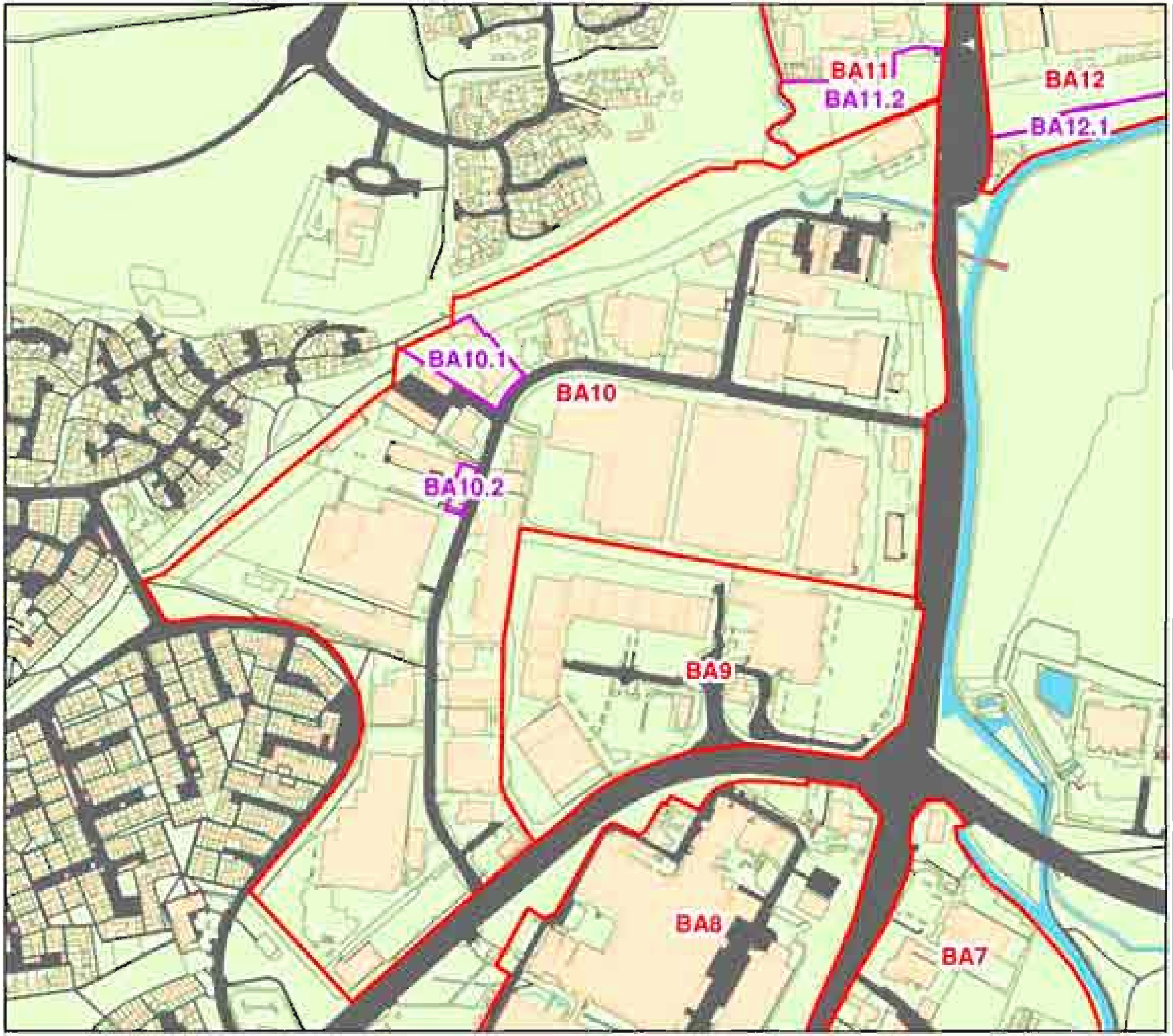
Vacant Land

Cherwell District
Employment Land Review

Cluster Map

URS


BA9
BA10
BA8
BA7
BA7.1
BA7.2
Legend
Cluster
Vacant Land
Cherwell District
Employment Land Review
Cluster Map
URS



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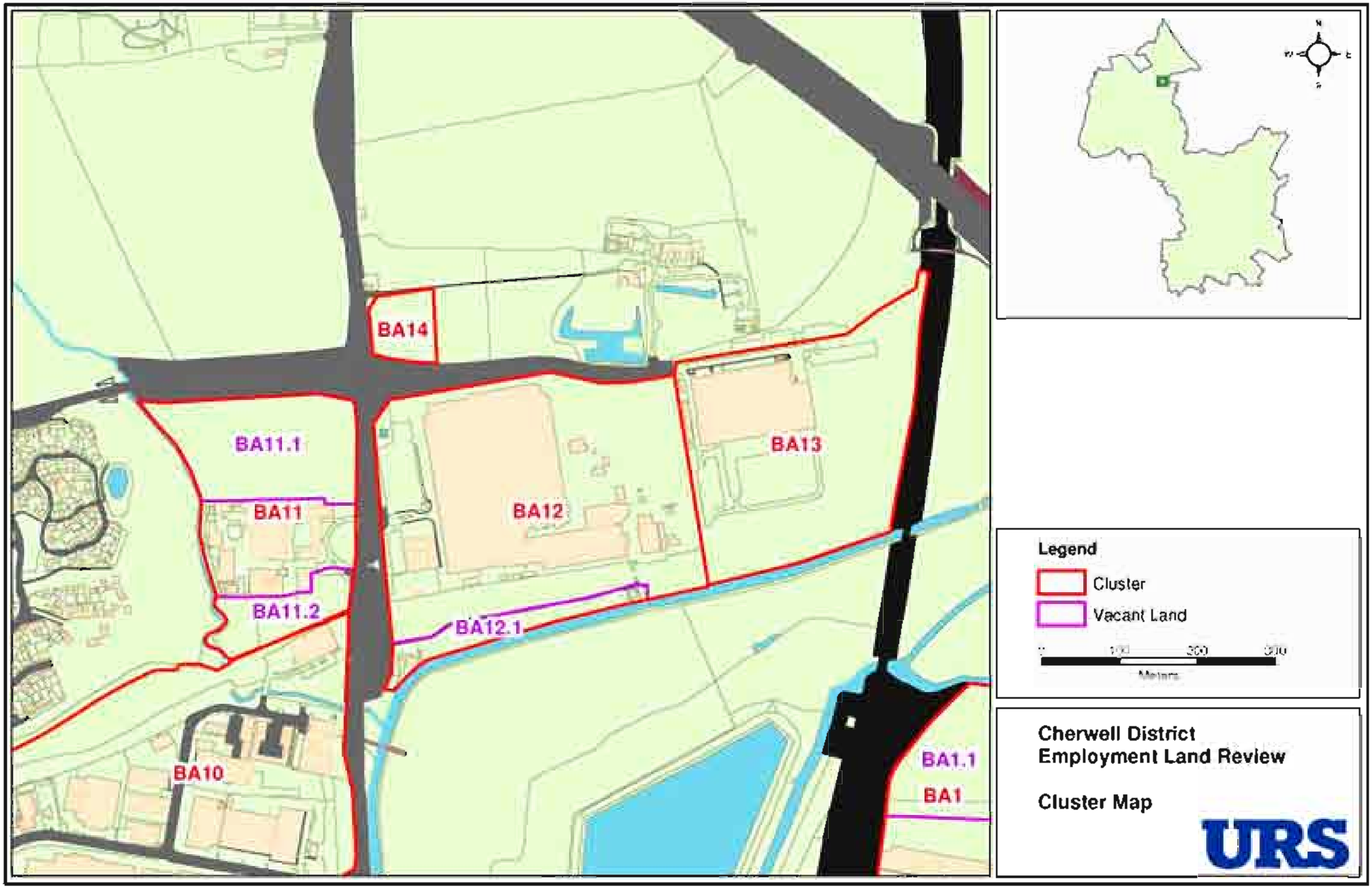
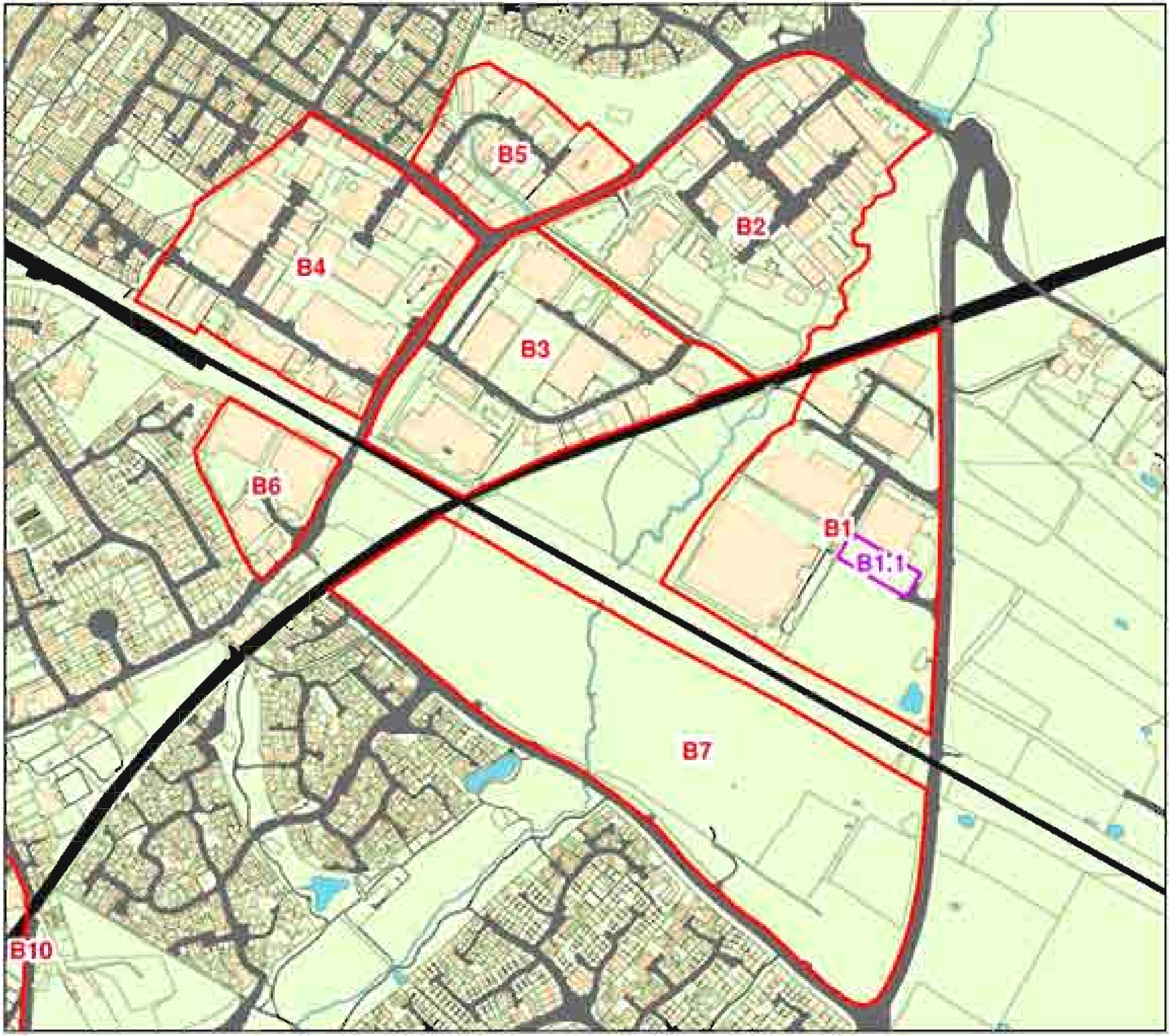
- Cluster
- Vacant Land

Cherwell District
Employment Land Review

Cluster Map



BA14
BA11.1
BA11
BA11.2
BA12
BA12.1
BA13
BA10
BA1.1
BA1
Legend
Cluster
Vacant Land
Metres
Cherwell District
Employment Land Review
Cluster Map
URS



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Cluster

Vacant Land

0 100 200 300 400 500

Meters

Cherwell District
Employment Land Review

Cluster Map

URS

Legend

Cluster

Vacant Land

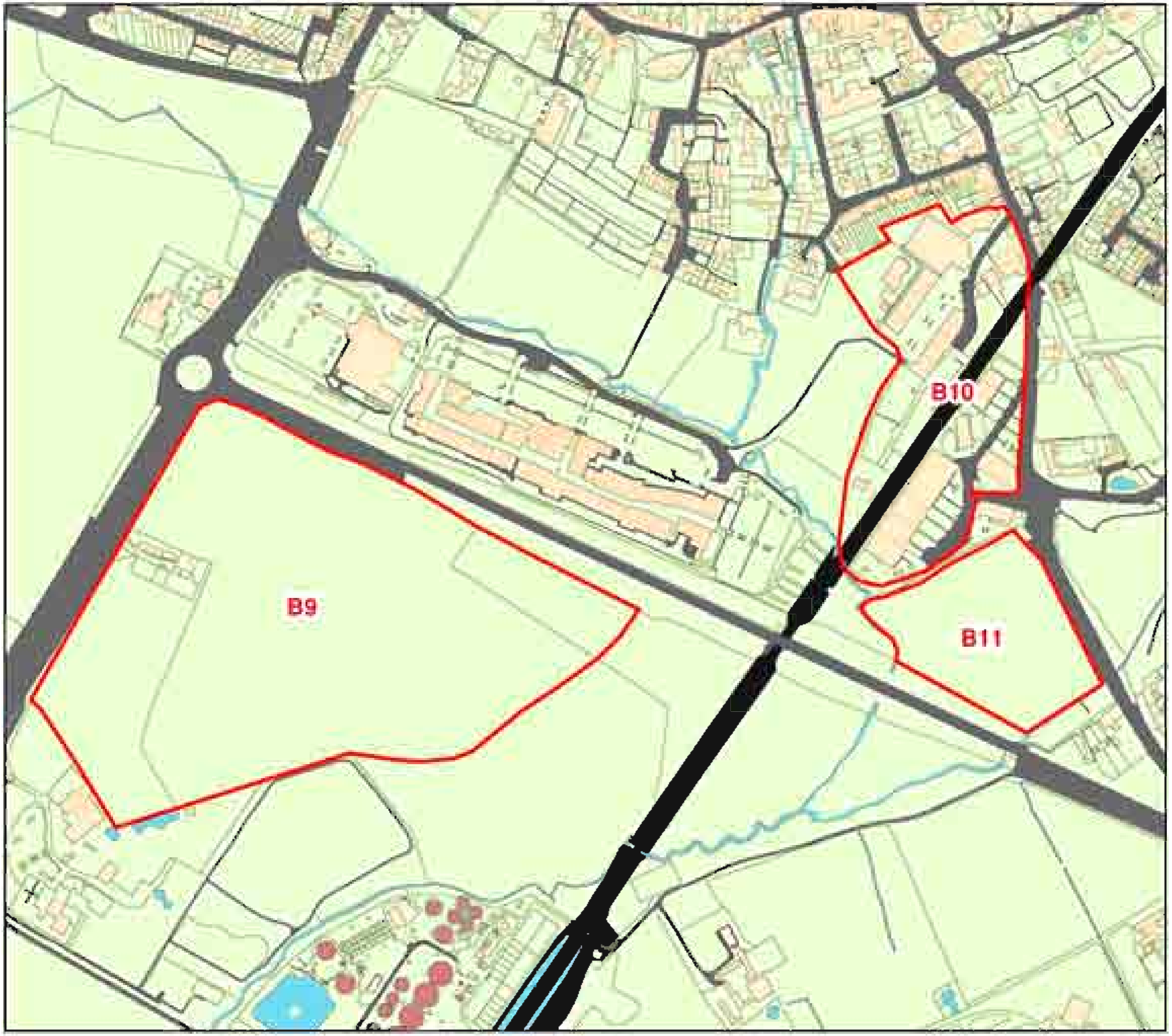
0 100 200 300 400 500 600

Metres

Cherwell District
Employment Land Review

Cluster Map

URS



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Cluster

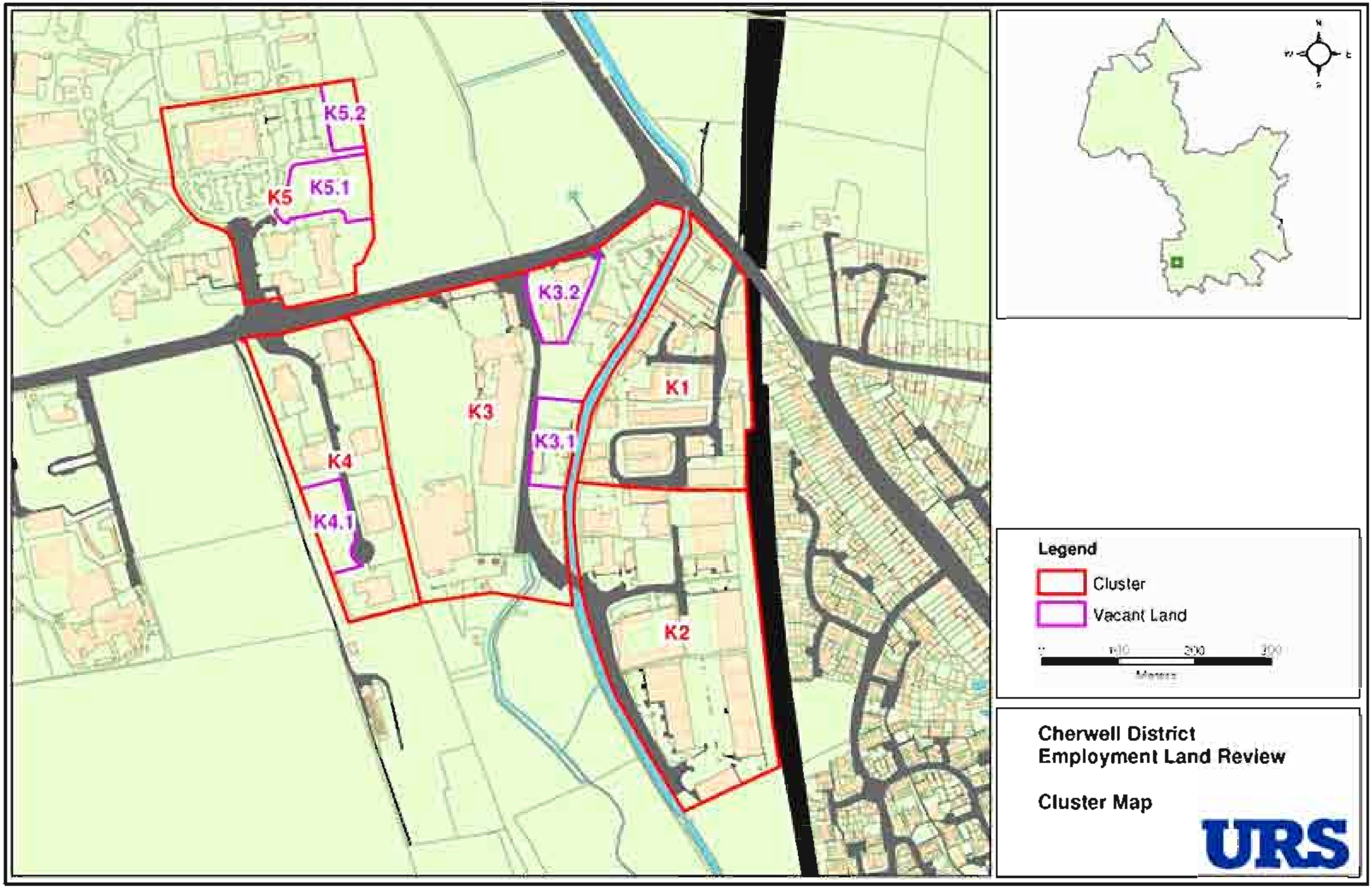
Vacant Land

0 100 200 300

Meters

Cherwell District
Employment Land Review

Cluster Map


K5.2
K5.1
K5
K3.2
K1
K3
K3.1
K4
K4.1
K2
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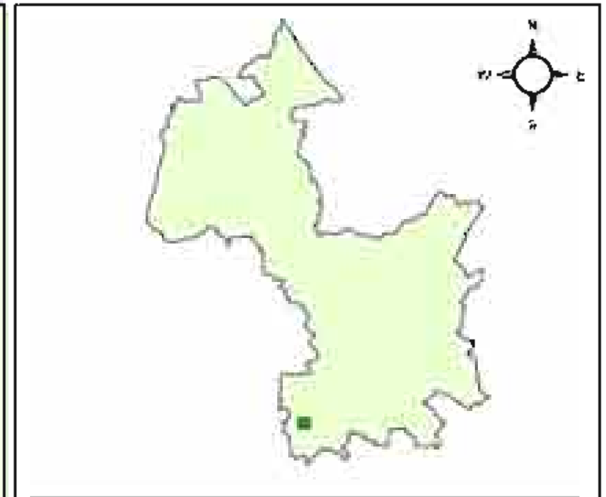
Cluster
Vacant Land
Cherwell District
Employment Land Review
Cluster Map
URS



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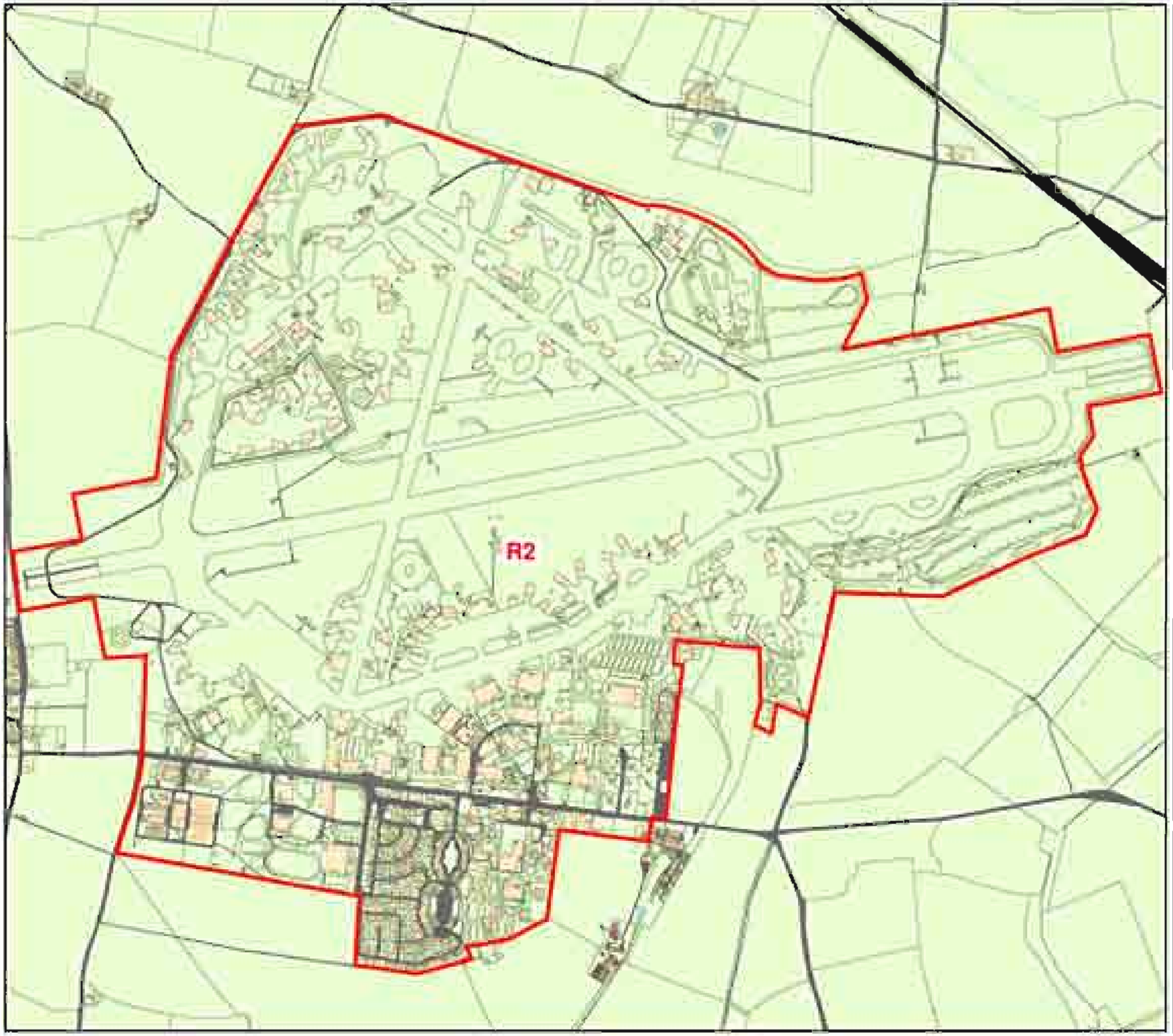
Cluster

Vacant Land

Cherwell District
Employment Land Review

Cluster Map

URS



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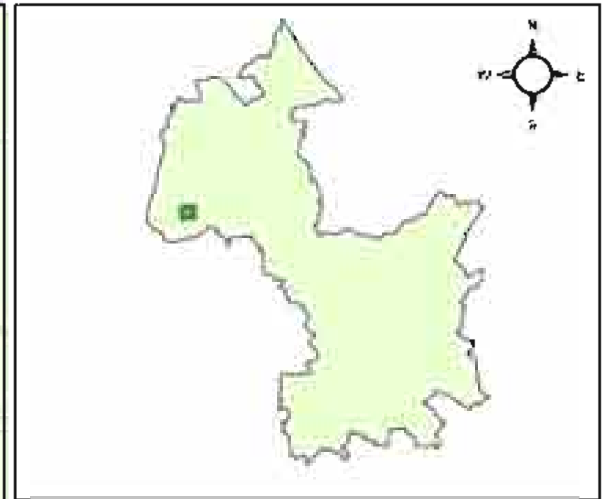
- Cluster
- Vacant Land

Cherwell District
Employment Land Review

Cluster Map

URS



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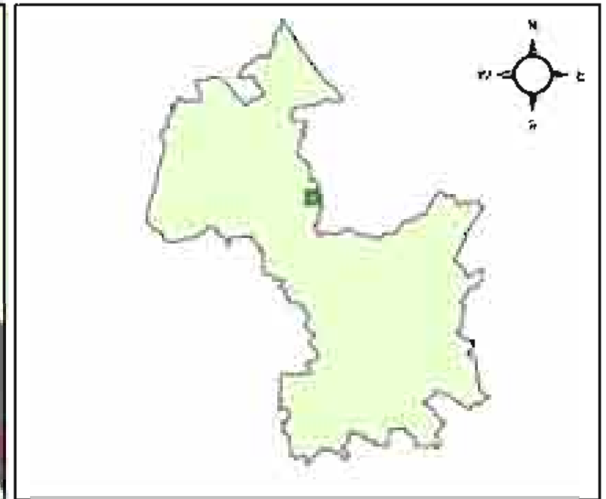
- Cluster
- Vacant Land

0 100 200
Meters

Cherwell District
Employment Land Review

Cluster Map

URS



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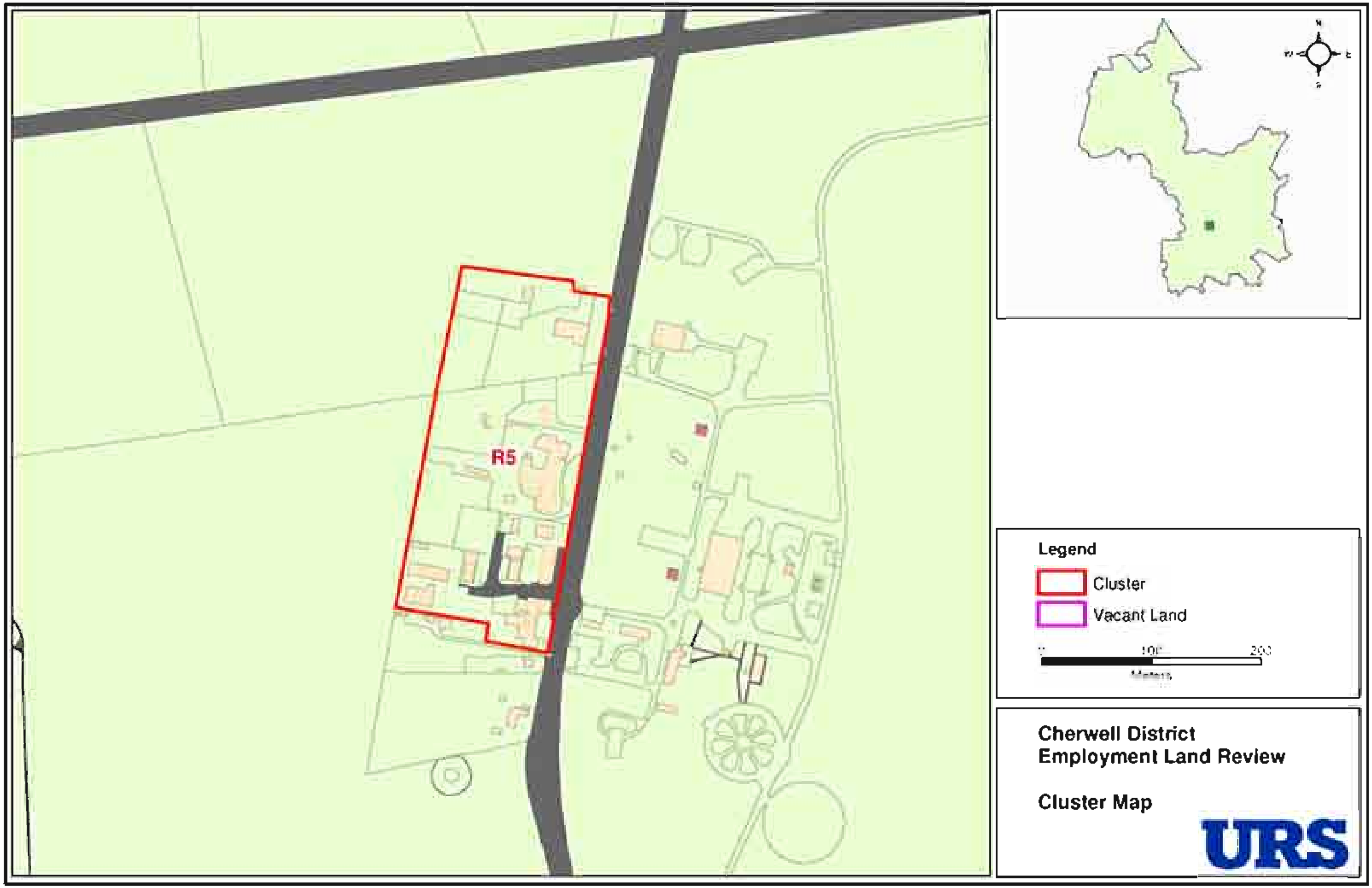
- Cluster
- Vacant Land

Cherwell District
Employment Land Review

Cluster Map

URS


R5
Legend
Cluster
Vacant Land
100
200
Cherwell District
Employment Land Review
Cluster Map
URS

Appendix C - Site Appraisal Questionnaire

Business Cluster Number:

Your Initials: ____________ **Date:** ____________

(C.1)**The cluster is best described as a:**

❑ Business park ❑ Recycling / environmental industrial sites ❑ Industrial estate ❑ Town centre / main shopping area

❑ Warehouse / distribution Park ❑ Incubator / SME cluster ❑ Local shopping centre ❑ Other____________________

(C.2)**Developable area in cluster** (complete site questionnaire for vacant land and buildings in poor condition)

This is an accumulation of identified and any unidentified vacant, in addition to any segments of developable land within developed sites *(see manual for definition).*

Vacant Land ____________% Vacant Building in good condition ______**(no.)** Vacant Building in poor condition ______**(no.)**

Buildings with active marketing **Yes** ❑ **No**❑

If yes, make note of site, type of buildings on site, floorspace or land available, estate agent.

(C.3) **Access to Road Network**

❑ Direct access to motorway

❑ Within 5 min drive to the motorway on an A-road

❑ Indirect access to motorway

Comments on proximity to motorway.

(C.4) **Internal road access is**

❑ Adequate for uses within cluster

❑ Not adequate for uses within cluster

❑ Don't know

❑ There are sites with limited HGV access

Always describe external and internal access and circulation (including adequacy). Please look at links to the national trunk road network.

(C.5)**Servicing of businesses in cluster**

(multiple answers possible)

- ❑ Road side loading/unloading
- ❑ Off road loading/unloading
- ❑ Loading bays

Always comment on servicing, **reason** for judgment on adequacy (C10.3)

Servicing is adequate for the uses within the cluster ❑ Yes ❑ No ❑ Don't know

(C.6)**Parking facilities**

(multiple answers possible)

- ❑ Dedicated parking within cluster
- ❑ On street parking
- ❑ Yellow / double yellow lines
- ❑ Red route
- ❑ Controlled parking zone/paid parking

Always comment on parking facilities **give reason** for judgment on adequacy of parking provision

Parking provision is: ❑ Adequate ❑ Too little ❑ Too much ❑ Don't know

(C.7)**Bad neighbourhood uses**
Businesses in the business cluster cause:

- ❑ None
- ❑ Noise pollution
- ❑ Air pollution
- ❑ Smell
- ❑ HGV traffic
- ❑ Significant car traffic
- ❑ Other (please comment)

Always comments on bad neighbourhood uses (except none) (C9.2)

(C.8)**Quality of environment**
(see manual for definition)

- ❑ Very good
- ❑ Good
- ❑ Poor
- ❑ Very poor

Always comments on quality of environment (C6.2)

(C.9)**The cluster lies within close proximity to / has impact on** *(multiple answers possible)*

❑ Residential uses ❑ Town centre ❑ Local shopping centre

Other ____

(C.10)**Contamination: are there site(s)/building(s) within the cluster with potential contamination?**

❑ Yes

❑ No

If yes, describe potential contamination and indicate on map

(C.11)**Condition of Buildings - % of buildings within Cluster in:**

Very Good ______% / Good__________% / Poor__________% / Very Poor %

(C.12)**Access to facilities and amenities** *(see manual for definition)*

❑ Very good ❑ Good ❑ Poor ❑ Very poor

(C.13)**Access to public transport** *(see manual for definition)*

❑ Very good ❑ Good ❑ Poor ❑ Very poor

(C.14)**Photographs**

Image number(s) ___________ / ___________ / ___________ / ___________ / ___________

(minimum of 1 image per cluster)

(C.15) **Any signs of development in the last five years / General description of cluster / comments on business cluster**

Always describe business cluster, and include any comments you have

Data input by (initials) ____________ Date ____________

Appendix D - Site Appraisal Results

Cherwell ELR Cluster Survey Results

No	Name	Ha	Cluster Description	Developable Area (%)	Vacant Buildings Good Condition	Vacant Buildings in Poor Condition	Active Marketing	Access to Road Network	Internal Road Acces	Servicing	Parking	Quality Environment	Bad Neighbour	Proximity	Contamination	Condtion of buildings	Very Good (%)	Good (%)	Poor (%)	Very Poor(%)	Facilities & Amenities	Public Transport	General Desciption
BA1	Banbury Cross Business Park	48.7	BP/WD/IE	5	5	1	Y	G	A	OR/A	D/A	VG	None	None	N		40	40	15	5	VP	VP	New high quality office in southeast corner, new IO centre near tracks, good condition with one vacant and derelict building on site being marketed. Mostly fully occupied.
BA2	Land North of Overthorpe Road	22.8	W/DP	25			N	G	A	LB/A	D/OS/A	VG	None	None	N		90	10			VP	VP	Dominated by Excel Distribution centres. Development site is now another distribution/warehouse building. Small site near rear left for development potential.
BA3	Land South of Overthorpe Road	21	Vacant	100			N	G	n/a												P	G	Large vacant site, no development, good visibility adjacent to M40
BA4	Thorpe Park	28.5	I/W/DP	0	7		Y	A	A	LB/A	D/OS/A	Poor	HGV Traffic	Resi	N		20	40	35	5	VP	P	Some new development in last five years. Congested, hard to see pulling ou of the roads, some rubbish and not very well maintained streets and sidewalks.
BA5	Land East Side of Railway - Cattle Market Area (Banbury Regeneration Area)	18.3	Housing	0			Y	A	A		D/OS/A	G	None	Resi	N			40	30	10	G	G	Part of Banbury Regeneration Area. Mix of small industrial units and large distribution units
BA6	Tramway Industrial Area (Banbury Regeneration Area)	19.8	BP/IE	0	4	3	Y	A	A	LB/RS/A	D/OS/A	G	HGV Traffic	None	N			40	50	10	G	G	Range of unit sizes. Car repair and other light industrial uses
BA7	Marley Industrial Estate	16.6	BP	3.1	2	0	Y	A	NA	RS/OR/LB/NA	D/OS/Y	G	S/HGV/CT	Local Shopping	N		20	50	30		VG	VG	Industrial with retail box stores on site, B&Q, Halfords, Congested area, hard to see intersections and access to roads
BA8	KRAFT	13.9	Factory	0	0	0	N	A	A	LB/A	DP/A	G	AP/S/HGV	Local Shopping	N			100			VG	VG	Dedicated site for KRAFT Foods, could not gain access onto site but looked in good condition and well maintained
BA9	Banbury Cross Retail Park	9.9	Retail	0	0	0	N	A	A	LB/A	DP	G	Car Traffic	Local Shopping	N		100	0	0	0	VG	VG	Retail centre.
BA10	Beaumont Industrial Estate	34.4	BP/IE/WD	2	4	1	Y	A	A	OR/LB/A	DP/OS/A	G	HGV	Local Shopping	N		40	50	10		VG	VG	Very active site, some empty buildings and unused parking lots currently being marketed for sale or lease
BA11	Alcan	6.4	IE	84		All	Y	A	A	LB/A	OS/A	P	None	None	Potential				100		P	P	Vacant former alcan laboratories and factory, building and land being marketed.
BA12	Alcoa	12.6	IE	7.1	0	0	N	A	DK	LB/A	OS/A	P	HGV/NP	None	Potential			80	20		P	P	Alcoa factory. Some offices in poor condition. Some land at bottom of site could be redeveloped
BA13	Hella	8.2	IE	0	0	0	N	A	A	LB/A	OS/A	G	HGV/NP	None	No			100	0	0	P	P	Hella manufacturers, large new buildings with well maintained grounds
B1	Bicester Park	15.6	W/D	0	0	0	N	A	A	LB/A	DP/A.	G	None	None	No		30	50	20	0	VP	VP	New Cooper Callas warehouse/office built on south east corner of site, large warehouses - budweiser, excel, new Fresh Direct Food distributors on northern allocated site. Good condition, slightly tight roads for turning.
B2	Telford Road	15.4	BP/IE	0	5	1	Y	P	A	LB/RS/A	D/OS/A	G	None	Resi	No			75	20	5	G	G	50's to 70's style park, buildings a bit run down, congested streets, quite a few agents signs.
B3	Chaucer Business Park	12.2	WD/IE	0	0	0	N	P	A	LB/A	D/OS/A	G	None	None	No		20	80	0	0	G	G	Well maintained buildings, large bakery on-site in good condition. New Brita Warehouse, BPG Warehouse built on allocated site in local plan.
B4	Murdoch Road	13.1	BP/IE	0	7	5	Y	P	A	LB/OR/A	D/OS/A	G	None	Resi	No			90	10	0	G	G	50's to 70's style buildings, a bit run down, unkempt environment. One block of buildings completely empty, reno's underway on first block of buildings, others being actively marketed.
B5	Wedgewood Road	4.8	BP	0	3	0	Y	P	A	OR/A	D/OS/A	G	None	Resi	No		0	70	30	0	G	G	
B6	Launton Road	3.4	BP	100	0	1	Y	P	DK	DK	DK	G	None	Local Centre	No		0	0	0	100	G	G	Vacant and derelict building on site, active marketing. Good location on mai road through town adjacent current business parks and new Wickes store on site across the street.
B7	Gavray Drive	14.3	N/A	100	0	0	N	P	n/a	n/a	n/a	n/a	n/a	Resi/Warehouse	No	n/a	0	0	0	0	VP	VP	Large vacant site across from resi and adjacent to large warehouse and distribution area, backs along rail line.
B8	RAF Bicester	9	Air base	No access				P															No access to site but from perimeter could see that all buildings were boarded up and in bad condition.
B9	Oxford Road	16	Vacant	100			N	A	n/a	n/a	n/a	n/a	n/a	Local Shopping	N	n/a	0	0	0	0	VG	VG	Large vacant site adjacent to A road and across from large retail shopping area.
B10	Station Approach	10.9	IE/BP	0	0	0		P	A	LB/A	D/A	G	None	None	Potential			80	15	5	G	VG	Mixed use business area, new build office park on north side of tracks, warehouse/distribution on south side.Also reclamation area with piles of rail way ties, rock and coal.
B11	DSDC Bicester		MoD	No access				P															No access to military area, drove around perimeter, site in good condition
K1	Cherwell Business Park	5.3	BP	0	5	2	Y	P	NA	OR/A	D/A	P	None	None	No			75	20	5	P	P	Slightly run down business park, roads in need of repair, roads have quite a lot of potholes. Older style buildings in need of updating, some asbestos cla roofing.
K2	Station Field Industrial Park	8.3	WD/BP	0	2	0	Y	P	A	LB/A	D/A	VG	None	None	No		90	10	0	0	P	P	Lots of new development, high quality large warehouse/office with new road layout and good access.
K3	West side of Canal	11.8	WD/BP	11.9	5	1	Y	P	A	LB/OR/A	D/A	VG	None	None	No		70	30	0	0	P	P	New high qaulity office built corner entrance, half occupied, half empty, new mercedes showroom and other new build on site. Some vacant site available for development. Good quality environment. One derelict building on entry road with large site for development.
K4	Motor Park	4.8	Retail	10.4	0	0	N	P	A	OR/A	D/A	VG	None	None	No	VG	100	0	0	0	P	P	All car sales centre 'car mall'. Good qaulity environment.
K5	Oxford Spires	6	BP	21.7	0	0	N	P	A	OR/A	D/A	VG	None	None	No		100	0	0	0	P	P	High quality office park. Good internal access and parking. Allocated development site is currently vacant.
K6	Yarnton Business Park (Oxford Business Park)	6.3	BP/WD	0	DK	0	Y	A	A	LB/OR/A	D/A	VG	None	None	No		100	0	0	0	P	P	Good quality high-tech business park with new warehouse/distribution units in rear. All very new and being actively marketed.
K7	Begbroke Science Park	4.8	Incubator/BP	0	0	0	Y	P	A	OR/A	D/A	VG	None	None	No		60	35	5	0	P	P	New developments on site, high quality site, self-contained area. Construction currently underway.
R1	Twyford Mill South of Adderbury	tbc	BP/WD	25		1	Y	P	A	LB/A	D/A	P	None	None	N			50	30	20	VP	VP	Fired Earth furniture warehouse had refurbished front of old building warehouse but back is still very rundown. Some room for new units, could be more efficient use of land.
R2	Upper Heyford Airfield	tbc	Airfield	DK	DK	DK	N	P				G	None		Potential								Large part disused air force base, hangars and bunkers are now being used privately and access to site was only partially prohibited. Not sure of extent of development that could take place being MoD land but could be potential for industrial expansion.
R3	Hook Norton – Brymbo Works	0.73	IE	95	0	0	N	P	NA	RS/NA	DP/NA	VP	None	None	Y		0	0	0	100	P	P	Workshop set up in old ironworks site, very rough and not maintained site, muddy roads and difficuly unmarked access.
R4	Banbury Business Park – Adderbury	4.4	BP	81	10	0	Y	P	A	OR/A	D/A	VG	None	None	N		100	0	0	0	VP	VP	Site allocated in local plan is now being developed into office development 2,500 to 50,000 sq ft available
R5	PA Turney site	tbc	BP	20	1	0	Y	P	A	LB/A	D/A	G	None	None	N		10	80	10	0	VP	VP	Some small industrial units some undeveloped land to back used for light industrial storage. New Kelberg Racing shop. Good condition.
R6	Wykham Mill	tbc	IE	5	1	1	Y	P	A	OR/LB/A	D/A	G	None	None	N			100	0	0	VP	VP	Works underway on converting old buildings into offices. Active estate, mostly occupied.

Appendix E - URS Research on Non-B1/B2/B8 Demand

Non-B1/B2/B8 Demand

URS have carried out a brief analysis of Cherwell District Council Business Directory to determine the level of occupation by non B-class businesses on industrial and business estates.

We also present information from other employment land surveys to illustrate the typically scale of non-B1/B2/B8 uses in industrial areas. These non-traditional uses could boost demand for employment land throughout Cherwell District.

Waste in Oxfordshire

Increasingly, another source of demand for employment land will be the need to have waste and recycling operations close to the place of production. According to the Government's waste strategy 'Waste Strategy 2000 for England and Wales', DETR, 2000, decisions regarding waste management should involve the 'best practicable environmental option (BPEO)'. The BPEO is based on three principles:

- The waste hierarchy: reduction (minimisation); re-use; recovery (recycling, composting, energy recovery); disposal;
- The proximity principle: requires waste to be managed as close to the place of production as possible; and
- Regional self-sufficiency: requires that each region provides facilities with sufficient capacity to manage the expected quantity of waste needed to be dealt with in that area for at least ten years.

Source: Oxfordshire Structure Plan 2016

As more focus is placed on the recovery and reuse of industrial and commercial waste, demand for locations near to waste producers will likely increase as the proximity principle comes into force. Operators of recycling and reclamation facilities are likely to find it more efficient to be located within existing industrial and commercial areas – close to their target market.

Policy W3 of Oxfordshire County Council's Minerals and Waste Local Plan 1996 states:

'Proposals for re-use/recycling will normally be permitted provided that:

The site is close to the source of the waste and/or the market for the re-used/recycled material;

The site is well related to appropriate parts of the transport network, and located where the number of and length of motorised journey is likely to be minimised…'

The County has set targets for the recovery of resources from waste and diversion of waste from landfill, increasing to 79% by 2015. Recycling and composting of municipal waste and construction and demolition waste is proposed to increase to 50% and commercial and industrial waste to 55%.

These policy drivers suggest that there will be increasing demand for waste facilities and pressure for these to be located in or on the edge of urban areas, in locations such as industrial parks. An example of work with potential parallels is research into potential new waste sites in London covered in the report prepared for the Greater London Authority 'Recycling and Recovery Facilities Sites investigation in London', July 2005. This indicates that 'vacant industrial land and floor space have by far the greatest potential for accommodating new waste management facilities'. Land characteristics and building types are generally suited to waste management activity and usually already have good access to the primary road network important to both industrial use and waste management.

Our research has also included a brief review of the locations of waste facilities in Cherwell, which is outlined below.

Currently, Cherwell's household waste recycling centres are mostly not in the towns themselves. The two household waste recycling centres in Cherwell are at Alkerton, which is seven miles west of Banbury, and Ardley Fields, which is about five miles from Bicester.

Commercial waste recycling centres currently operating in Cherwell are presented in Table E-1 below:

Table E-1 Commercial Waste Recycling in Cherwell

Centre	Activity
DTC, Unit D4, Telford Road, Bicester	Recycles all parts of computers plus telephones and cabling.
Smiths of Bloxham, Milton Road, Bloxham, Near Banbury	Recycles aluminium cans.
Sita, Enstone Airfield, Chipping Norton	Recycles cardboard and office paper.
The Bumper Man, Central Panels, Chipping Norton	Repairs used bumpers and sells as a reduced price.

Source: Commercial A-Z Guide to Materials Recycling, 2005

Cherwell Council's Business Directory is a comprehensive database of occupiers of B-class premises in the District. Companies listed as operating waste disposal or waste management services on or near industrial estates are listed below in Table E-2 below.

Table E-2 Waste Disposal/Management Services

Business Name	Location	Town
Orrtec Ltd	Telford Road Industrial Estate	Bicester
A C Daniels & Co Ltd	Station Field Industrial Estate	Kidlington
Grundon S Services Ltd	Merton Street	Banbury
Shanks Waste Services	Thorpe Way Industrial Estate	Banbury
WRAP	The Old Academy, 21 Horse Fair	Banbury

Source: CDC Business Directory, 2005

This analysis on waste facilities demand and supply suggests that:

- There are good reasons to expect an increase in the demand for waste facilities in Oxfordshire
- Waste facilities in Cherwell are currently mostly located outside the main towns
- Some of the industrial areas in the District could though be well placed to accommodate future growth.

Other Non-B1/B2/B8 Occupiers

In addition to waste facilities Cherwell Council's Business Directory includes details on the following non B-class businesses that are occupying premises on Cherwell's business and industrial parks are:

Table E-3 Non B-Class Occupiers of Industrial Estates in Bicester

Name	Estate	Business Classification
Sidalls Bicester Ltd	Chaucer Industrial Estate, Bicester	Builders' Merchants
Beyond Beauty	McKay Trading Estate, Bicester	Beauty Salons & Consultants
Plumb Centre	McKay Trading Estate, Bicester	Plumbers' Merchants
The Family Tree - Indoor Adventure Play	Murdock Road Industrial Estate, Bicester	Leisure Centres & Products

Source: Cherwell Council Business Directory, 2005

In our experience this is a fairly modest list of typical non-B1/B2/B8 uses given the scale of occupied employment land in Cherwell. It is possible that there may be a number of other non-B1/B2/B8 users on Cherwell's industrial estates that have not been picked up in our analysis of Cherwell's Business Directory. Our research has also not extended to review of such activities in neighbouring council areas such as Oxford City, which form parts of the relevant employment land markets. It is possible that there is a greater range of non-B1/B2/B8 uses on these industrial areas.

Information from other URS employment land work includes surveys of the main industrial areas in Barking & Dagenham and Havering Councils in 2003 which found that

17% and 13% respectively of land in their estates was occupied by non-B1/B2/B8 uses (not including wholesale activities).

Key factors coming out of our analysis on non-B1/B2/N8 demand include:

- there will be a growing demand for waste sector facilities and some industrial areas in Cherwell, and possibly elsewhere in relevant employment land markets, could be well placed to accommodate this demand
- initial evidence of other non-B1/B2/B8 uses in Cherwell suggests there are relatively few such occupiers. However it is possible that data is incomplete and/or there are specific reasons why there are modest numbers of such uses in Cherwell. In addition we have not analysed the demand for such uses in other parts of relevant employment land markets, such as in Oxford City, and such places may have more significant elements of non-B1/B2/B8 uses.
- surveys elsewhere suggest non-B1/B2/B8 uses can occupy around 15% of industrial areas.

We judge that the demand for non-B1/B2/B8 uses is a valid element of demand that should be added on to the demand for B1/B2/B8 uses. In the context of Cherwell the statistics used for forecasting B1/B2/B8 demand in Section 5 below largely do not pick up on this extra element of demand. We have prepared forecasts assuming this demand represents 10% of B1/B2/B8 demand. Given the relative lack of data and uncertainties over the scale of demand we present these demand scenarios separately from the core B1/B2/B8 demand.

Appendix F - URS Research on Land Supply in Oxfordshire County

Land Supply in Oxfordshire County

URS have reviewed local plans and proposals maps and also made enquiries to the local authorities to ascertain the amount of land available in the other Districts of Oxfordshire County. Results are presented below for each District. Figures have been checked against OCC's Employment Land and Development Monitor and are in line with the report and with what was from enquiries to Council officers.

West Oxfordshire

According to information from West Oxfordshire District Council there are only two remaining sites designated for employment development in West Oxfordshire. The sites are the residual of larger Local Plan designations, which have been partially developed. The Council does not anticipate any additional land being brought forward for employment use within the plan period. Table F-1 provides more detail on the sites available in West Oxfordshire.

Table F-1 Land Available for Potential Development in West Oxfordshire

Name	Site Area (ha)
Witney Downs Road East	2.3
Witney Downs Road East	4.0
Total	**6.3**

Source: URS Research, 2006, West Oxfordshire Employment Land Audit, April 2005

South Oxfordshire

According to South Oxfordshire District Council there are approximately eight sites remaining for employment development in the area. Some of the sites, such as the Didcot Parkway Railway Station site, will only be brought forward if they are not needed for other uses. Table F-2 below provides more detail.

Table F-2 Land Available for Potential Development in South Oxfordshire

Name (Local Plan Reference)	Site Area (ha)
WAL5i-v	5.8
HEN3	5.2
DID8i	2.7
DID8ii	0.3
DID11	Limited – infill only
RUR5	Limited – infill only
RUR8	Limited – infill only
RUR11	1.0
Total	**14.9**

Source: URS Research, 2006

Vale of White Horse

The Vale of White Horse has the second largest amount of available developable employment land next to Cherwell. The Annual Monitoring Report states that there are 12 sites available for development and eleven sites with unimplemented planning permission, totalling 35.6 ha of land. Table F-3 below provides more detail.

Table F-3 Land Available for Potential Development in Vale of White Horse

Name	Site Area
Oxford West/ Minns Park	0.5
Botley Works	0.3
Wiles Close Pioneer Road	0.5
North east of Pioneer Road	1.6
Harwell Campus	4.0
Rectory Lane Trading Estate	1.0
Reservoir and pumping station	1.2
S of Milton Park	0.5
Uffington Station	1.4
Grove Technology Park	5.1
Shrivenham Hundred Business Park	6.0
Milton Park	Unknown
Harwell Campus	0.6
Grove technology Park	0.6
Grove technology Park	0.6
Land off Pioneer Road	1.1
Milton Park	4.4
Abingdon Business Park	0.6
White Horse Park	0.2
White Horse Park	0.1
Abingdon Science Park	0.6
Abingdon science Park	3.0
S of Former Pavlova Works	1.7
Total	**35.6**

Source: URS Research, 2006

Appendix G - Population Growth and Employment in Bicester

Population Growth and Employment in Bicester

Introduction

The future of Bicester is a matter of ongoing debate. It has been identified in the draft South East Plan as being able to provide for a large proportion of Cherwell District's future housing allocations. The current draft of the South East Plan sets out targets for the provision of new homes up to 2026. Oxfordshire County's current target is set at 2,360 new homes per annum of which Cherwell District is expected to contribute 590 homes per annum and Bicester itself is expected to contribute 215 new homes per annum – almost 10% of the County's and 40% of Cherwell's total target.

Roger Tym & Partners (RTP) in association with Land Use Planning recently published the report *'Augmenting the Evidence Base for the Examination in Public of the South East Plan'.* The report sets out four separate growth scenarios over and above the targets set out in the draft South East Plan. Scenarios put forward for Cherwell District range from 674 new dwellings per annum up to 811 new dwelling per annum.

We have undertaken an exercise to try to determine the implications the different growth scenarios will have on employment and employment land demand in Bicester and provide some guidance on an appropriate employment strategy in relation to these different levels of growth.

Growth Scenarios

The RTP report put forward three alternative dwelling forecasts (one demographically based and one economic based) over and above the target of 28,900 new homes in the South East by 2026 set out in the draft South East Plan:

- 33,000 (demographically based on long term migration) – 4,100 dwellings per annum above the SEP figure.
- 37,000 (demographically based on short term migration) – 8,100 dwellings per annum above the SEP figure.
- 46,000 (economic based[23]) – 17,100 dwellings per annum above the SEP figure.

Four options have been identified for distributing the increased dwelling figures around the South East.

- Options A & B – pro-rata increases. i.e. If location X has 5% of the 28,900 SEP dwelling figure, it also has 5% of the +4,100 dwellings and 5% of the +8,100 dwellings.

[23] Based on an employment forecast of 654,000 new jobs by 2026 and assuming the South East aims to meet all its additional jobs from within its own workforce

- Option C – Applies only to the higher demographic based level of growth (+8,100) and distributes the dwelling per annum to the core towns and cities of the Region as defined by the Functional Urban Region (FURs) described in the draft South East Plan. The additional growth is allocated in proportion to the population of each FUR centre.
- Option D – Employment led Growth. Converting employment projections to household forecasts allocating the 17,100 additional households per annum based upon district distributions.

Relevant Growth Distributions

The results of the growth scenarios and distribution options are set out in Table G-1.

Table G-1 Growth Scenarios

	South East	Oxfordshire	Cherwell	Bicester*
South East Plan	28,907	2,360	590	215
Option A – Plus 4,100 pro-rata	33,000	2,694	674	242
Option B – Plus 8,100 (pro rata)	37,000	3,021	755	272
Option C - Plus 8,100 (FUR)	37,000	2,641	590	215
Option D - Plus 17,100 (employment)	46,000	3,818	811	291

Source: RTP, 2006
** For the purpose of this report the distribution for Bicester in Option C and D has been done on pro-rata bases maintaining a 36% proportion of Cherwell Districts allocations.*

Potential Population

To determine the potential population growth in relation to each of the growth scenarios we have applied the average household size of Cherwell District (2.4 people per household) to the number of dwellings proposed for Bicester over the next twenty years.

Table G-2 Potential Future Dwellings and Population in Bicester

No of dwelling in Bicester	2016		2026	
	Dwellings	Population	Dwellings	Population
SE Plan – 215 per annum	2,150	5,160	4,300	10,320
Option A – 242 per annum	2,420	5,808	4,840	11,616
Option B – 272 per annum	2,720	6,858	5,440	13,056
Option C – 215 per annum	2,150	5,160	4,300	10,320
Option D – 291 per annum	2,910	6,984	5,820	13,968

Source: URS, 2006

Potential Employment

In order to assess the potential implications for employment and employment land demand in Bicester we have assumed the current workforce characteristics presented in Table G-3 will remain constant into the future. A more detailed analysis into the sustainability of each scenario is beyond the scope of this commission and would need to be carried out separately.

Table G-3 Existing Population Characteristics

	Bicester (numbers)	Bicester (%)
Population	*28,663*	*100*
Working age	18,995	66
Economically Active	16,595	87*
% of local workforce working in Bicester		35

Source: ONS, Nomis
** As a percent of working age population*

Our analysis below sets out the numbers of additional jobs required in Bicester to cater to the potential new workforce based on the four growth scenarios by 2016 and up to 2026.

Growth Option A

Based on the workforce characteristics of Bicester's present population and growth option A, there are 1,166 additional jobs required by 2016 and a total of 2,334 jobs required by 2026 to accommodate the potential future population.

Table G-4 Matching Employment with Option A

	2016	2026
Population	5,808	11,616
Working age	3,833	7,666
Economically active	3,334	6,669
Total jobs required (35% local employment)	1,166	2,334

Source: URS, 2006

Growth Option B

Based on the workforce characteristics of Bicester's present population and growth Option B, there are 1,378 additional jobs required by 2016 and a total of 2,623 jobs required by 2026 to accommodate the potential future population.

Table G-5 Matching Employment with Option B

	2016	2026
Population	6,858	13,056
Working age	4,526	8,616
Economically active	3,937	7,496
Total jobs required (35% local employment)	1,378	2,623

Source: URS, 2006

Growth Option C

Based on the workforce characteristics of Bicester's present population and growth Option C, there are 1,037 additional jobs required by 2016 and a total 2,073 jobs required by 2026 to accommodate the potential future population.

Table G-6 Matching Employment with Option C

	2016	2026
Population	5,160	10,320
Working age	3,405	6,811
Economically active	2,962	5,925
Total jobs required (35% local employment)	1,037	2,073

Source: URS, 2006

Growth Option D

Based on the workforce characteristics of Bicester's present population and growth Option D, there are 1,403 additional jobs required by 2016 and a total 2,807 jobs required by 2026 to accommodate the potential future population.

Table G-7 Matching Employment with Option D

	2016	2026
Population	6,984	13,968
Working age	4,609	9,218
Economically active	4,010	8,020
Total jobs required (35% local employment)	1,403	2,807

Source: URS, 2006

Summary

Our analysis has set out the additional demand for employment land in Bicester based on the four potential growth scenarios and a number of assumptions about the future workforce in Bicester. The different growth scenarios represent an additional demand of for jobs in Bicester of between 2,073 and 2,623. It is worth noting that some of this employment growth would have already been accounted for in our forecasts for land demand set out in Section 8 and 9 of this report and the net additional employment demand would be less than what is set out above.

The recommendations of this report allocate 32 hectares of employment land in Bicester distributed between B1, B2 and B8 class uses. By applying standard plot ratios and employment densities to the current land allocations a minimum 5,500 jobs could be provided in Bicester over the next plan period.

Table G-8 Jobs Provided on Allocated Land

	B1	B2	B8
Total Land Available in Bicester up to 2026	10.3	12.5	9.8
Plot Ratio	0.6	0.45	0.5
Potential Built out Floorspace	61,800	56,250	49,000
Employment Densities	24	29	50
No of jobs provided	**2,575**	**1,940**	**980**

Source: URS, 2006

A Strategy for Bicester

The educational qualifications and skills of the existing Bicester population tend to be slightly higher than average which suggests that appropriate new job opportunities are going to tend to be at the B1 spectrum of land use more than B2 or B8.

Bicester has the potential to become the economic hub of Cherwell District. Its excellent road and rail links make an ideal location for business and industry. An economic development strategy for Bicester would aim to maximise its potential and build on its existing relationship with Oxford City and Begbroke Science Park.

The land available in Bicester for employment development has the potential to provide substantial amounts of jobs over the next twenty years. The potential of those sites should be maximised by encouraging high-density good quality developments with focus on Bicester's key growth sectors. By adopting strict development standards encouraging the development of more town centre type offices rather than campus or business park style environments higher levels of employment could be reached for each site.

Sites within existing business and industrial areas should be monitored for redevelopment and intensification opportunities. Where possible improvement strategies should be implemented to enhance the business environment and improve the perception of Bicester as a centre for business with the aim of attracting new and modern businesses into the town.

Appendix H - Data Sources

For the analysis of industrial land, the socio-economic and business structure this report uses:

- Annual Business Inquiry, Employee and Workplace Analysis (1995-2004)
  The ABI is a national level survey providing employee and workplace data by industry classification (SIC code) from the Inter Departmental Business Register (IDBR). Sub-national analyses are obtained by a combination of conventional and synthetic estimation methods. The value of data is dependent on the accuracy of the IDBR. Since the IDBR contains confidential information it is not open to public scrutiny and there is no independent information on reliability and accuracy of the data as a result.

- VOA, Floorspace and Rateable Value Statistics for Commercial and Industrial Properties (1998-2004)
  Data from 'Floorspace and Rateable Value Statistics for Commercial and Industrial Properties' is produced annually by the Department for Communities and Local Government (Previously the ODPM) with the Valuation Office Agency (VOA) and University College London (UCL). Its purpose is to provide: 'the timely, accurate and efficient assessment of the rateable values of 'hereditaments'.' The data is considered to be accurate and reliable.

- ONS, Local Area Labour Force Statistics (Mar 2003 – Apr 2004)
- ONS, Mid-year Population Estimates, 2004
- ONS, Census 2001
- Annual Population Survey (Apr 2005 – Mar 2005)
- Annual Survey of Hours and Earnings, 2005
- Origin-Destination Statistics for Local Authorities, Census 2001
- ONS, VAT registrations and de-registrations

This report also makes use of and takes into account the following policies, strategies and guidance:

- PPS1 'Delivering Sustainable Communities' (DCLG, 2005)
- PPG2 'Green Belts' (DCLG, 2001 amended March 2001)
- PPG 3 'Housing' (DCLG, 2000 updated January 2005)
- Draft PPS3 'Housing' (DCLG, December 2005)
- PPG4 'Industrial, Commercial Development and Small Firms' (DCLG, 1992)
- PPS6 'Planning for Town Centres' (DCLG, 2005)
- PPS7 'Sustainable Development in Rural Areas' (DCLG, 2004)
- Regional Planning Guidance for the South East (RPG9) (GO-SE, 2001)
- A Clear Vision for the South East 'The South East Plan' (SEERA, 2006)
- Regional Economic Strategy for South East England (2002-2012) (SEEDA, 2002)
- Oxfordshire Structure Plan 2016 (OCC, 2005)
- Adopted Cherwell Local Plan 1996 (CDC, 1996)
- Non-Statutory Cherwell Local Plan December 2004 (CDC, 2004)
- Cherwell Community Plan 2016 (CDC, 2002)
- Draft 3: Cherwell Economic Development Strategy (CDC, 2005)