



**Lambert
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Hampton**

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Employment Land Study

covering

Test Valley Borough

on behalf of

Eastleigh Borough Council

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1.0 EXECUTIVE SUMMARY

Lambert Smith Hampton (LSH) has been commissioned by Eastleigh Borough Council (EBC), lead authority for the project, to prepare a study of existing employment sites within the Boroughs of Eastleigh, Southampton, Test Valley and Winchester, to determine their quality and suitability in the context of current and future business requirements.

The objective of this Employment Study is to deliver a rounded and reliable assessment of existing sites identified for employment use in the Local Authorities mentioned above, in terms of their market demand and appeal, their quality and suitability for purpose and their current and future availability to the market. The sites have been graded at A to E to reflect their current status. Sites in categories D and E are to be regarded as of poor quality (and value) in their present state. Many of the sites may be capable of achieving higher grades through redevelopment, investment or improved infrastructure provision. Every employment market needs sites across a range of qualities to suit different occupiers and to meet differing needs including sites for new enterprises and low value occupiers. As an example car breakers yards are an important part of the range of provision but will score in grade E that does not imply there is no need for sites within this range.

There are other categories and subcategories within the employment land and property market that might be classified as Grade D or E that still have a very important place in the market because the occupiers cannot afford modern or expensive buildings or where there is no particular need for anything other than the most basic property.

1.1 Test Valley Borough site reviews

Reference	Site name/address	Grade A-E	Quality
TV18	South of Brownhill Way	A	High
TV13	University of Southampton Science Park	B	Above average
TV16	Nursling Estate	B	
TV01	Andover Business Park (aka Andover Commercial Park or Andover Airfield)	B	
TV17	Hampshire Corporate Park	B	
TV23	Bargain Farm	B	
TV15	Adanac Park	B	
TV09	Abbey Park Industrial Estate, Premier Way	B	
TV27	Weyhill Fairground	B	
TV22	University of Southampton Science Park Extension	C	
TV04	East Portway Business Park	C	
TV05	West Portway Business Park	C	

Reference	Site name/address	Grade A-E	Quality	
TV02	Walworth Business Park	C	Below average	
TV08	Glenmore Business Park, Colebrook Way	C		
TV06	Meridian Park, Greenwich Way	D		
TV07	Anton Mill Trading Estate, Anton Mill Road	D		
TV10	Romsey Industrial Estate (aka Greatbridge Industrial Estate)	D		
TV19	Belbins Business Park	D		
TV11	Budds Lane Industrial Estate	D		
TV26	Harewood Forest Industrial Estate	D		
TV14	Test Valley Business Park	D		
TV24	Weyhill Business Park	D		
TV03	Walworth Business Park Extension	D		
TV28	Mayfield Avenue Industrial Estate	D		
TV25	Dean Hill Park	E		Low
TV12	Whitenap	E		
TV20	Wynford Industrial Park, Belbins	E		
TV21	Yokesford Hill Industrial Estate, Belbins	E		

Table 1 - Summary of Test Valley Borough land study, including scoring assessment

- 1.1.1 The north-south linear shape of Test Valley district, revolving around the two distinct and very different towns of Andover and Romsey, ensures that there are two distinct characters and this is the case in terms of the business space proposition in the Borough.
- 1.1.2 It has been noted that there has been new employment development in the Borough over the past ten years but all the 'A' (High) and 'B' (Above average) graded sites are modern and have seen some new build or refurbishment in the last five years or so.
- 1.1.3 A number of the industrial sites, even those with 'B' (Above average) ratings, experience varying proportions of older style buildings in need of refurbishment and sometimes, suffer from a higher level of site coverage than would be proposed or desired now.
- 1.1.4 A number of the sites in the 'C' (Average), 'D' (Below average) and 'E' (Low) categories are lacking in prominence and profile. Some are close or adjacent to residential areas and may be sensitive to complaints of noise, disruption or 24-hour operation.
- 1.1.5 In future, development planning should allow, where possible, for a range of tenures as the market needs to be able to offer freehold and long leasehold opportunities, in addition to the standard 'institutional style' leasehold premises.
- 1.1.6 From the ranking schedule, it is clear that the rural locations score poorly, but this is because they have failings in several categories. However, they still have a rightful and important place in the market and schemes of this type should potentially be protected to satisfy demand.

2.0 INTRODUCTION

2.1 Purpose of the report

2.1.1 Lambert Smith Hampton (LSH) has been commissioned by Eastleigh Borough Council (EBC), lead authority for the project, to prepare a study of existing employment sites within the Boroughs of Eastleigh, Southampton, Test Valley and Winchester, to determine their quality and suitability in the context of current and future business requirements.

2.1.2 The objective of this Employment Study is to deliver a rounded and reliable assessment of existing sites identified for employment use in the Local Authorities mentioned above, in terms of their market demand and appeal, their quality and suitability for purpose and their current and future availability to the market.

2.1.3 The study aims to examine and validate the qualitative data supplied for each site, to provide a market-based perspective and to give the study a 'commercial edge'. We have identified the sites that are well suited to meet the needs of the modern business; sites that should be safeguarded against competing higher value uses; any sites that may be subject to market failure; and those sites to be brought forward for future employment use.

2.1.4 In turn, this assessment will help to set targets for the identification of new sites in local spatial plans to ensure that sufficient employment land of the right type and in the right location is preserved or released to satisfy foreseeable property requirements.

2.1.5 This report contains the following:

- Details of the study methodology that has been used in appraising the employment sites, including the sources that have been consulted to form an understanding of the property market context;
- Commentary that demonstrates a critical understanding of the recent work undertaken by GL Hearn on behalf of the PUSH authorities, by Oxford Economics on behalf of the Solent LEP and by AECOM on behalf of the Solent LEP. The implications for future employment land provision will need to be considered and reported;
- An overview of the broad market context for the supply of and demand for office, industrial and warehouse floor space within different parts of the study area, over the past ten years, leading to a current picture and a discussion of possible changes/trends in the market over the next three to five years;
- An overview of the future prospects for the local and sub-regional office and industrial property market within different parts of the study area;

- The site assessment outcomes in summary and in detail for each Local Authority area;
- Conclusions on the current suitability of the assessed employment sites for meeting existing and future demand, taking account of the potential for improvements through new investment;
- Identification of any gaps in the study area's employment land provision, with particular regard to the economic sectors that are prioritised for investment and growth by the Solent LEP/relevant economic strategies.

2.2 LSH Credentials and methodology

- 2.2.1 Our instructions are to provide a realistic, market orientated study on the projected level of occupier demand and to compare the existing and future supply of employment land (predominantly those with 'B' Class availability) based on our extensive market knowledge and research across the Solent region.
- 2.2.2 LSH is the UK and Ireland's largest commercial property consultancy (a subsidiary of Countrywide Plc). We are a national network with our headquarters based in London and 34 other regional offices, employing more than 1,500 staff.
- 2.2.3 Along the South Coast, we have the strongest and largest transactional team, operating from two offices in Fareham and Southampton with 19 surveyors/agents, including eight directors. We have been established in the region for over 25 years, servicing office/industrial, retail and commercial property requirements on the South Coast, between Chichester and Poole.
- 2.2.4 With agency and valuation departments offering a comprehensive range of skills and knowledge, we have a strong track record and for the ninth consecutive year, have been awarded Most Active Agent in Hampshire by the national publication, Estate Gazette.
- 2.2.5 During 2015 LSH's South Coast team transacted over 1.8 million sq ft of business space in the region.

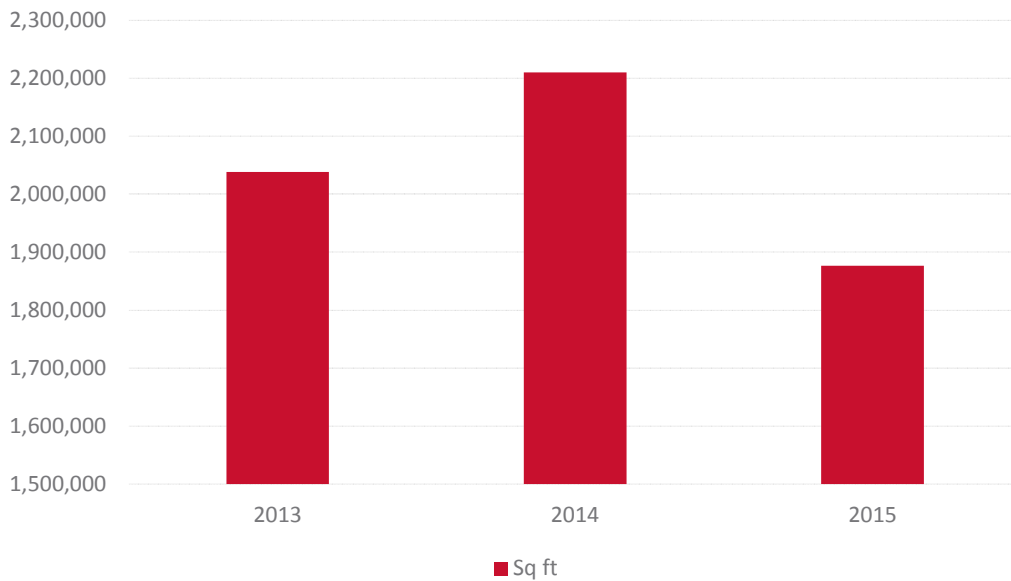


Figure 1 - Total sq ft transacted by LSH's South Coast agency division 2013 to 2015 (Source: LSH)

- 2.2.6 This advice does not accord within minimum reporting requirements of the RICS Valuation Professional Standards January 2014, and consequently, this does not constitute a formal valuation in accordance with these standards, although the basis of valuation adopted accords with the RICS definition of Market Value.
- 2.2.7 We have purposefully spent time 'on the ground' revisiting industrial estates and office parks in the Local Authorities' areas, to ensure our intelligence is up to date and accurately represented. This enabled us to understand the status and activity of the occupier's business better, the state of the property's repair and its suitability for continued occupation or redevelopment. However, we are regularly engaged in transactions on a day-to-day basis in the majority of the established employment areas and have live or have had, previous instructions in many of the employment sites. For the purpose of this report, we did not visit every site as this was neither logistically nor commercially viable. However, we have carried out desktop and web-based appraisals on every site.
- 2.2.8 To enable a comparative assessment, in Appendix 1 we have provided a scoring system based on a list of criteria, which can be used to assess the quality of existing floor space in industrial and office accommodation and potential redevelopment opportunities.
- 2.2.9 To support this study, we have analysed the supply of industrial employment floor space (both historically and at the present time) and considered the potential future supply of employment development land.
- 2.2.10 The changing nature of occupier's property requirements and the dynamics of how the Local Authorities relate to each other and the sub-regional marketplace is inevitably complex and will certainly be in a state of flux over the coming years. This is due to the impact of the major

projected land releases and take-up of development opportunities in the South Hampshire region. Nevertheless, it is important to consider the wider picture as to how the land supply and perceived demand will be influenced in a sub-regional context, especially in relation to the ambitions of the PUSH based strategic policies. In addition it should be noted that parts of Test Valley and Winchester lie outside of the South Hampshire sub-region.

2.2.11 N.B.: Neither the commercial property market or the occupier market has any respect for Local Authority administrative boundaries. Locational decisions are likely to be made on the basis of the road, rail and waterways infrastructure, workforce availability, telecoms/internet connectivity, as well as the quality and availability of accommodation as well as the availability of finance.

2.2.12 In the context of this report we may refer to the following Use Classes:

B1(a) Offices other than A2

B1(b) R&D – labs, studios, etc.

B1(c) Light industrial

B2 General industrial

B8 Storage and distribution including warehouse and logistics

2.2.13 Any figures provided for availability, take-up or supply refer to actual buildings as opposed to sites.

2.2.14 All of the sites have been scored, on a consistent basis, in accordance with the scoring matrix (Appendix 1) and the sites are evenly spread across the bands from 'A' (High Quality) to 'E' (Low Quality). The sites have all been assessed against a range of criteria under the following headings:

- Location/accessibility
- Layout and prominence
- Area character/neighbouring uses
- Local amenities/public transport
- Planning status
- Occupier perception/values
- Age and suitability
- Redevelopment prospects and constraints.

3.0 HAMPSHIRE MARKET OVERVIEW

3.1 General

- 3.1.1 The current global factors including Brexit, the slowdown in China's growth, falling oil prices etc., may impact the economy on the economy at a local level in the future. However, recent data shows that there has been strong business confidence in the area in the first quarter of 2016.
- 3.1.2 In the industrial and logistics sector e-tailers, particularly in the non-food sectors, have been a major demand driver. This, combined with a lack of employment-related development, has seen availability reach an all-time low, especially in key locations along the M27 Corridor (the towns and cities located along the M27 motorway including Southampton, Eastleigh, Fareham and Portsmouth).
- 3.1.3 We have seen a growth in occupier demand over the last three years. This economic background has generated an increase in prime rents and falling tenant's incentives, which is facilitating the potential for new development. Institutions are becoming increasingly confident in the South Coast market and are taking the first steps towards speculative development of industrial and logistics schemes, with several planning applications having been submitted and approved during the course of 2015 and early 2016, including Test Lane South at Nursling, Alpha Park in Chandlers Ford, Dunsbury Hill Farm in Havant and Voyager Park in Portsmouth.
- 3.1.4 There are prime locations along the M27 Corridor where new-build office schemes are on the horizon, and these would include Lakeside, North Harbour, Portsmouth in the east, Royal Pier Waterfront and Station Quarter in Southampton, and Chilcomb Centre and Station Approach in Winchester, although pre-lets are required to stimulate developments at these locations. At Southampton Science Park, however, offices are being speculatively built owing to full occupancy here.
- 3.1.5 This future office development pipeline is driven by a number of factors. There is growth in sectors such as hotel and student accommodation in Winchester and Southampton, along with Permitted Development conversions to residential and these have had a significant impact on the office supply.

3.2 Industrial market overview

- 3.2.1 The South Coast industrial/warehouse market is continuing to enjoy an encouraging level of activity. This is resulting in the South Coast experiencing a shortage of good quality, modern, detached industrial and logistics units in suitable locations, as there has been a negligible

amount of speculative development taking place over the last five to ten years as a result of uncertainty in the UK property and financial markets created by the banking crisis.

3.2.2 This recent demand has outstripped the supply of both prime and secondary units in the region, providing a positive level of activity which has given developers and institutions the confidence to consider undertaking speculative development, particularly for units of 30,000 sq ft to 100,000 sq ft.

3.2.3 Looking forward, the churn in the market will show signs of slowing down as occupiers struggle to identify suitable premises to move to, and this will continue until construction of new development schemes has completed. As a result, business expansion and new start-ups will be restricted, particularly in terms of small, freehold unit schemes in good, strategic locations. The expected take-up of pre-let opportunities by larger companies should release a stock of smaller buildings into the market, which will help soak up this latent demand.

3.2.4 A number of multi-let industrial estates are seeing higher occupancy rates. It is anticipated that the knock-on effect will be that the region will see an increase in speculative development during the course of 2016.

3.2.5 Availability

3.2.5.1 Availability of existing units in South Hampshire and Andover, including those under construction, at the end of Q4 2015 was 3.48 million sq ft, representing less than eighteen months' supply, based upon the level of take-up during 2015.

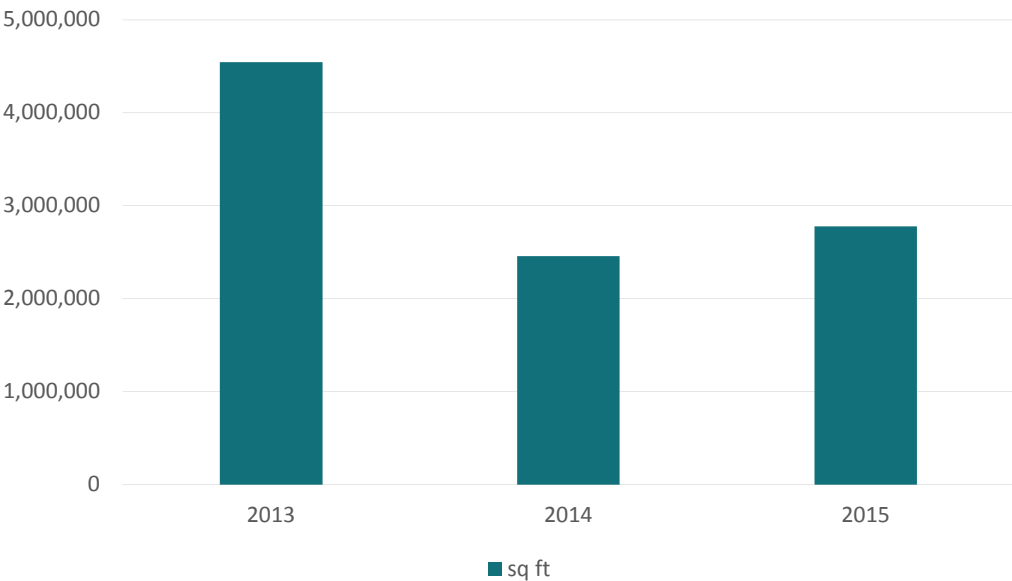


Figure 2 – South Hampshire and Andover industrial availability for the period 2013 to 2015 (Source: LSH and CoStar)

3.2.5.2 From 2017, there will be a change to Permitted Development Rights to facilitate residential conversions from light industrial up to a maximum floor space of 500 sq m (5,382 sq ft).

3.2.6 Take-up

3.2.6.1 Take-up in South Hampshire and Andover for the 2015 period was over 1.36 million sq ft, which is down from the previous year. This can, at least, be partly accounted for by the lack of available stock in the region. In 2016, we would expect demand to continue at a similar level to that of 2015, although take-up could be hampered by the on-going lack of stock. There will be a pipeline of limited new employment-related development in the region, set to commence towards the end of 2016 and into 2017. As demand has increased and supply has fallen over the course of the last three years, we have experienced a rise in rents throughout the region. We anticipate that as supply increases, net effective rental values will start to level off again.

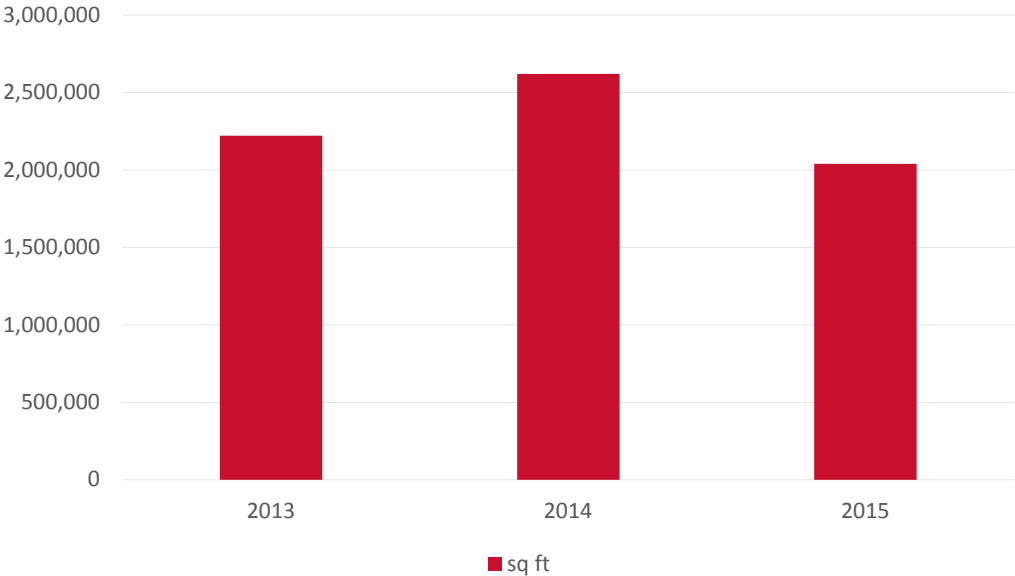


Figure 3 – South Hampshire and Andover industrial take-up for the period 2013 to 2015 (Source: LSH and CoStar)

3.2.7 Rents and capital values

3.2.7.1 The shortage of supply has had a positive impact on rents, particularly on good quality, second hand, modern units with self-contained yards and this will have a knock-on effect on prime and pre-let rental levels. For more detailed information on specific locations, see *Table 1* below.

3.2.7.2 In some popular, desirable locations we could see prime rents increasing to circa £9.00 to £10.00 per sq ft during 2016 as supply tightens further.

3.2.7.3 Regarding incentives, during 2015, these reduced from an average of twelve months on a five year term to three to six months. We have also witnessed an increase in the number of occupiers willing to sign up to leases of more than ten years to secure space. Again, this has given developers and institutions the confidence to consider acquisitions on the South Coast seriously.

3.2.7.4 It is worth noting that build costs are increasing, which has also had an impact on rental values.

3.2.7.5 With yield compression impacting on capital values, we envisage that owner-occupiers will now be expected to pay higher values than those seen since the recession, particularly on smaller units.

Under 5,000 sq ft	Prime capital value per sq ft	Prime headline rent per sq ft	Secondary capital value per sq ft	Secondary headline rent per sq ft
Eastleigh	£120.00 - £140.00	£10.00	£85.00 - £95.00	£7.75
Southampton	£120.00 - £140.00	£10.00	£85.00 - £95.00	£7.75
Winchester	£115.00 - £140.00	£10.00	£90.00 - £100.00	£7.75
Test Valley	£120.00 - £140.00	£9.50	£85.00 - £90.00	£7.50

5,000 – 20,000 sq ft	Prime capital value per sq ft	Prime headline rent per sq ft	Secondary capital value per sq ft	Secondary headline rent per sq ft
Eastleigh	£115.00 - £140.00	£9.00	£60.00 - £75.00	£8.75
Southampton	£115.00 - £140.00	£9.00	£60.00 - £75.00	£7.75
Winchester	£120.00 - £140.00	£8.75	£75.00 - £95.00	£7.75
Test Valley	£110.00 - £130.00	£7.75	£65.00 - £75.00	£7.25

Over 20,000 sq ft	Prime capital value per sq ft	Prime headline rent per sq ft	Secondary capital value per sq ft	Secondary headline rent per sq ft
Eastleigh	£115.00 - £140.00	£9.00	£55.00 - £65.00	£8.50
Southampton	£115.00 - £140.00	£9.00	£70.00 - £85.00	£8.50
Winchester	£120.00 - £140.00	£8.75	£75.00 - £95.00	£7.50
Test Valley	£110.00 - £130.00	£7.50	£60.00 - £70.00	£7.25

Table 2 - Industrial Headline rents and capital values across the region (Source: LSH, 2015)

3.2.8 Summary

3.2.8.1 In conclusion, the take-up of industrial property in the County is encouraging with demand outstripping supply. This, in turn, has led the property industry to commence speculative schemes. As larger occupiers take up this new space, this will lead to opportunities for small/medium size operators to occupy vacated space. It is clear that due to current and expected demand, employment sites need to be protected for industrial and logistics use and that these sites provide the flexibility required by operators, including good vehicular access and 24-hour use.

3.3 Office market overview

3.3.1 The South Hampshire region benefitted from an improving occupational market during 2015. There was a notable increase in the number of larger enquiries for our region, and this transferred into positive take-up figures and falling supply.

3.3.2 The reduction in supply is influenced by three main factors:

1. Permitted Development Rights – conversion of offices to residential (and also other uses);
2. Improving occupancy rates;
3. No new speculative office developments for seven years.

3.3.3 Whilst there has been a trend for out-of-town business park style developments, there is a feeling that more office developments will, in the future, take advantage of public transport hubs in city centres or adjacent to Parkway style railway stations, in particular, to attract more staff.

3.3.4 Office availability in South Hampshire and Andover, stood at just over 1.37 million sq ft at the end of 2015, suggesting that there is circa 30 month’s supply, at the current rate of take-up. Grade A space is particularly under pressure. Although we anticipate significant take up in 2016, it may well fall below that of 2015 as supply constrains opportunities for relocation.

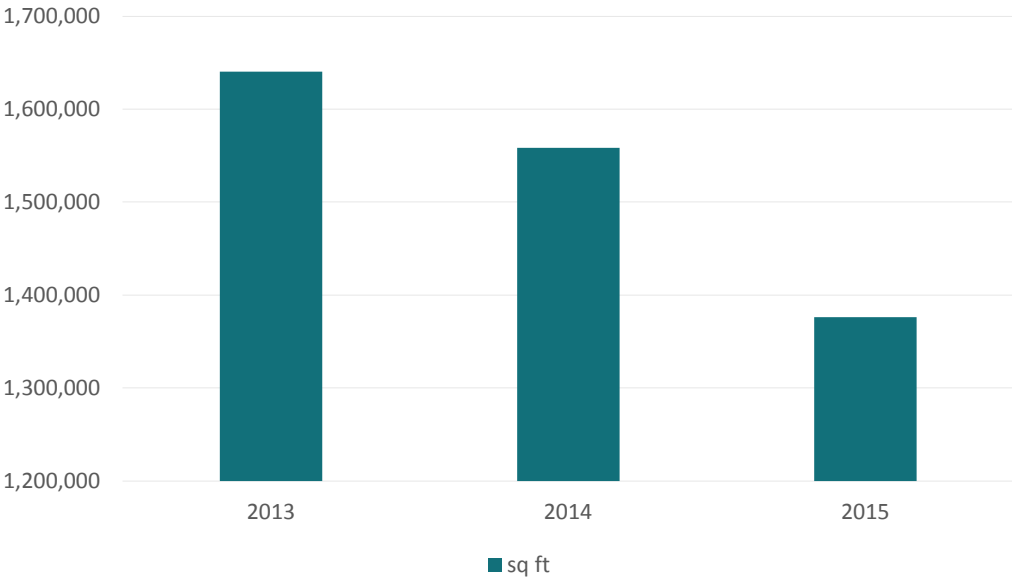


Figure 4 – South Hampshire and Andover office availability for the period 2013 to 2015 (Source: LSH and CoStar)

3.3.5 The expectation is that the trend of falling supply is set to continue and as a result, prime rents along the M27 corridor will continue to rise, and incentives will fall further in the short to medium term.

3.3.6 Availability

3.3.6.1 There is a lack of office stock along the South Coast, in particular, Grade A accommodation. A number of development sites such as Mayflower Plaza, Southampton (116,000 sq ft), and The Bond, Southampton (156,790 sq ft), which were allocated for offices, have now either been converted to alternative uses or, have planning consents for change of use, and this trend looks likely to continue. There is also concern that Aqua in Southampton (60,572 sq ft) may come forward with a planning application for hotel use in the future.

3.3.6.2 As availability continues to fall and with limited new employment-related development in the pipeline, the choice for businesses is narrowing. Rents are on the rise, and incentives offered to tenants are reducing. These factors are leading towards a situation where the potential for development is once again, being stimulated in prime locations.

3.3.6.3 However, pre-lets with rents nearer to £25 per sq ft are currently required to make employment-related development/new builds viable. As mentioned earlier in this report, speculative development has been started at Southampton Science Park, where occupancy is at a very high level and where demand is still strong.

3.3.7 Take-up

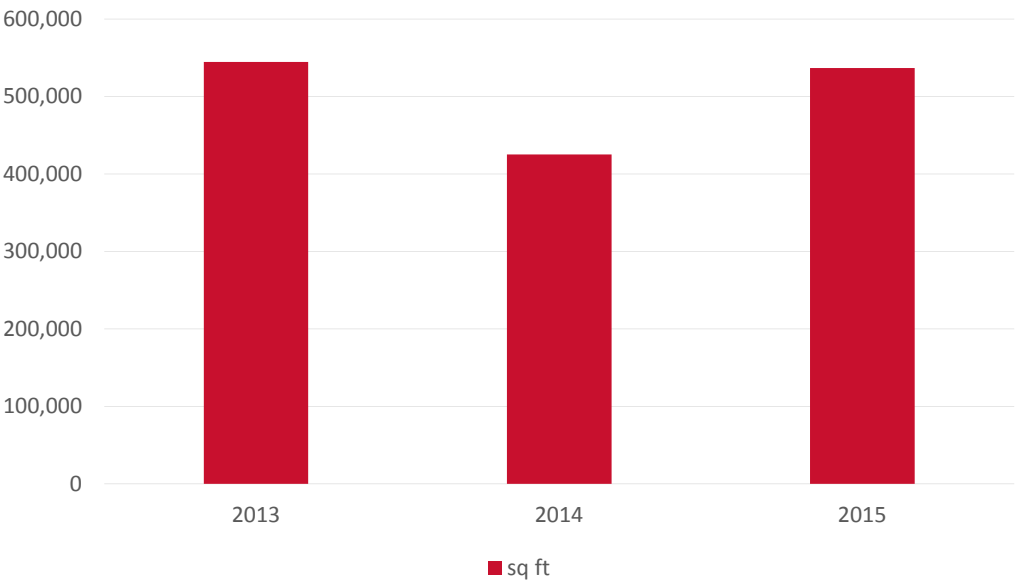


Figure 5 – South Hampshire and Andover office take-up for the period 2013 to 2015 (Source: LSH and CoStar)

3.3.7.1 Much of the occupier demand, in particular from corporate occupiers, has been due to business expansion and a preference to upgrade to higher quality office space. Modern working practices are changing with a need for an agiler working environment to include open plan single floor plates, good break-out space and access to amenities, including shopping, food and drink, gym/exercise and showers required to attract and retain the best staff.

3.3.7.2 Despite improving economic conditions and growing business confidence, there was a decline in enquiries during the second half of 2015 and in particular, in Q4. However, enquiries bounced back in Q1 2016. This volatility is likely to have been influenced in part by the fall in supply, with opportunities for businesses to relocate being constrained, prompting occupiers to consider renewal of leases within their current buildings. Current global economic factors may also be playing a part in business confidence.

3.3.8 Rents and capital values

3.3.8.1 In South Hampshire, prime office rents have increased by circa 5-10% over the past twelve months, where supply is particularly constrained and where building fundamentals of good location, high quality specification, market leading parking ratios and access to amenities are evident.

3.3.8.2 In conjunction, tenant incentives for open market lettings have reduced over the same period. Where previously an 18 month rent free period was typically required for a five year term certain, this has now fallen to circa six to twelve months in the current market.

3.3.8.3 Prevailing conditions have seen quoting rents in prime locations increase, with space now being marketed at headline rents of at least £20.00 per sq ft on buildings with excellent quality accommodation and best-in-class parking ratios of one space per 200 sq ft of floor space. For more detailed information on specific locations, see *Table 2* below.

3.3.8.4 In the medium term and if the current economic conditions continue, we can expect to see a rise in prime rents beyond £20.00 per sq ft, where the right supply and demand dynamics prevail. We anticipate this will stimulate the next wave of office development for the region in key locations but still led by pre-lettings.

Under 5,000 sq ft	Prime capital value per sq ft	Prime headline rent per sq ft	Secondary capital value per sq ft	Secondary headline rent per sq ft
Eastleigh	£250.00	£20.00	£140.00 - £190.00	£12.00 - £16.00
Southampton	£250.00	£20.00	£140.00 - £190.00	£12.00 - £16.00
Winchester	£375.00	£25.00	£200.00 - £250.00	£12.00 - £19.00
Test Valley	£325.00	£23.00	£130.00	£12.00

Table 3 - Office headline rents and capital values across the region (Source: LSH, 2015)

3.3.9 Summary

3.3.9.1 The conclusions on the office market are that the projections are for a steady increase in take-up and a consequent fall in supply. In particular, there is a distinct move from occupiers to take higher quality office space with flexible floor plates. Conversely, the demand for more 'traditional' office space is declining. The fall in supply has been exacerbated by the introduction of buy to let. It is, therefore, important that prime office sites and buildings in the region are protected for office use and, whilst the conversion of secondary and tertiary office sites to residential uses has been a positive effect in some areas, the loss of better sites adjacent to transport hubs could be a disadvantage. There could, in the future, be more of an accent on mixed-use developments to include alongside offices, elements of residential, retail and leisure and provide a higher level of sustainability.

3.4 Maritime industry

3.4.1 The Solent area has unique sectorial strengths and is already home to some 1,750 marine related businesses. The Solent LEP supports the proposal to establish a Marine and Maritime Strategy for the Solent to reflect the sector's crucial role to the local economy as identified in the following statement:

'...nurturing the capacity and growth of the sector, through the formation of Marine Enterprise Hubs and securing adequate access to support waterside manufacturing sites.'

3.4.2 The [Transforming Solent, Marine & Maritime Supplement](#), prepared by Rear Admiral Rob Stevens, CB, in March 2014, which is a supplement to the Solent's Strategic Economic Plan (SEP), proposes a strategy for re-kindling the Solent's world renowned marine and maritime strengths.

3.4.3 Six strategic themes have been identified in the report as follows:

1. **Leadership** - establishing an accountable group with the authority to drive the long-term, sustainable growth of Solent's marine and maritime sectors.
2. **Developing our Ports** - creating a clear plan for the development of our Ports, their infrastructure, logistics and expansion.
3. **Marine manufacturing** - nurturing the capacity and growth of the sector, through the formation of Marine Enterprise Hubs and securing adequate access to support waterside marine manufacturing sites.
4. **Technology and innovation** - building on our world-class marine and maritime research and development assets, and creating a national Large Structures Composite Centre with associated skills training.

- 5. **Skills** – addressing the fact that 20% of employers in our sector are already experiencing recruitment difficulties and taking urgent steps to avoid future skills gaps, resulting from the need to replace 50% of our associate professionals and technicians and 30% of skilled trades people in the next ten years.
- 6. **Brand Solent** – creating a Global Marine Excellence brand for the Solent through a regional marketing campaign, underpinned by a new iconic project - Sir Ben Ainslie's America's Cup bid.

3.4.4 The two key strategic themes supported by the LEP will help to promote centres identified for strategic marine sector based hubs and should help to realise these aspirations. A number of key priorities have been acknowledged, which are outlined below:

Key Priorities	Responsibility	Timescale	LGD	Solent LEP Response
Marine Manufacturing Hubs Create marine manufacturing hubs in Southampton, Portsmouth, including the Isle of Wight (Marine) Enterprise Zone.	Solent LEP / M&M WG	2014 onwards	£10m	Further detail and business case development needed to inform future SEP/LGD process
Incubation Centres Create incubation centres within each manufacturing hub, providing access to flexible premises, business support and innovation services.	Solent LEP / M&M WG	2015 onwards	£1.5m	Further detail and business case development needed to inform future SEP/LGD process

Table 4 - LEP marine proposals (Source: Transforming Solent, Marine & Maritime Supplement)

- 3.4.5 Our experience of marine industries of the past twenty to thirty years in Southampton, is that there is a big gap between those businesses where there is a general requirement for good water access, with deep water moorings and an established Quay, whilst at the other end of the scale much of the activity can be likened to cottage industry in small, cheap buildings where direct water access may be a bonus as opposed to a necessity.
- 3.4.6 This is why developments such as Shamrock Quay and Saxon Wharf, on the Itchen Riverside in Southampton, have performed so well, as they re-use older quayside buildings which have been divided up into smaller units and let relatively cheaply. As important is the atmosphere created by these developments, with a mix of complementary uses, moorings, plus facilities for sailors and boat owners, communal facilities such as boat lift facilities and open storage yards with active management and some on-site catering. Similar facilities and atmosphere prevail in other working marinas around the Solent and along the River Hamble.
- 3.4.7 Furthermore, the underlying principles of the Solent City Deal are to deliver suitable employment sites in Southampton and Portsmouth to facilitate the growing marine, maritime and advanced manufacturing sectors. There is specific reliance on the delivery of Centenary Quay in Southampton (and Tipner/Horsea Island in Portsmouth), which is to be unlocked by assembling public and private sector land and agreeing funding packages to provide the enabling infrastructure.

3.4.8 Marine industries represent a very significant economic force within the Solent region and have been identified consistently in various economic studies as one of its major strengths and being pivotal to future GVA and job growth. The sector contains a wide diversity of businesses, ranging from SMEs to global enterprises and, in addition to the important commercial port activity, the main categories are:

- Industrial processing sites requiring waterside locations for bulk shipping transport and/or the ready supply of sea water for use within processes.
- Businesses requiring a waterside location or use of water space to provide services for recreational and commercial craft, for example, marinas, boatyards, shipyards, sailing clubs, etc.
- Businesses providing products and services sustained principally by the local market in proximity to their main customer base, but not necessarily on the coast, such as boat sales, chandlers, sail makers, riggers, etc.
- Maritime research and development including innovation, design and technical activity.
- National manufacturers or service providers located in the Solent area by choice, either historically or attracted to the profile, reputation and skill base available including defence and allied industries, such as the Marine and Coastguard Agency.

3.4.9 To reinforce the sector's importance, the Solent is home to some 1,750 marine related businesses, employing over 40,000 personnel and representing the major advanced manufacturing and marine cluster in the UK. Testimony to this status was recently exemplified by the arrival of the BAR America's Cup team base in Portsmouth. To retain and expand this sector's activity, the current and future availability of built stock and employment land is clearly a fundamental pre-requisite and we advocate that the larger, strategic sites such as Tipner West, should be protected and promoted. Although these sites are outside the study areas, it is accepted that economic activity does not respect administrative or geographic boundaries, and it is indicative of the general trends affecting the sector.

3.4.10 To encourage and capture 'world-class' marine occupiers to the Solent, the market must provide long term, quality working environments in the right locations, with the opportunity to develop new buildings with the required modern specification (eaves height, layout, floor loading, image, staff facilities, etc.).

3.4.11 As the economic revival continues, the demand for employment space will invariably grow and without the provision of 'quality sites' capable of delivery with certainty the larger, primary marine occupiers will gravitate elsewhere in the UK and Europe. The significance and economic importance of maritime industry to the Solent region is key:

- Incubation marine centre of excellence ties up with Further Education and Universities
- City Deal and LEP keen to promote this sector, reference Stevens' report.
- Marine occupiers' characteristics - 'cottage industries', often contract-led thus short commitments, many marine businesses are cost conscious and often land hungry.

3.4.12 It is important to give careful consideration to marine occupier's needs and wants when establishing employment sites for this type of user, including:

- Cheaper smaller buildings
- Flexible terms
- Short term leases
- Often contract lead
- Don't always need connection to water, but is desirable
- Local connections to supply chain and skills

3.4.13 **Summary**

3.4.13.1 The maritime industry is a unique and valuable asset to the County. In order to build upon this, it is imperative, wherever possible and feasible, to deliver modern buildings with the appropriate specifications. This can include, but not exclusively, water access and flexible tenure for a very broad range of potential occupiers. It is, therefore, important to protect and retain sites which have these special characteristics, in order to support this important part of the regional economy. There is also merit in retaining some older (and hence cheaper to rent) stock to ensure that all elements of the sector are catered for. In some cases, the pressure on waterside sites can be even greater than on other employment sites from alternative uses, such as residential and from environmental and ecological factors.

3.5 **Rural industry**

3.5.1 In our view, there are some sites within the study area, which do not fit into the established category or description of industrial estates, but still have a role in the hierarchy of available employment accommodation.

3.5.2 These sites are often rural in character, but not exclusively. Generally, they consist of former agricultural buildings, but can also include former military sites, where small scale businesses can make use of old and sometimes relatively poor quality buildings, plus areas of hard-standing for open storage and vehicle parking.

- 3.5.3 These sites are used by a wide range of trades, sometimes including non-conforming or unneighbourly uses, but in many cases they are away from residential areas and therefore, do not create undue nuisance or disturbance.
- 3.5.4 Such sites are generally home for small businesses or start-ups, sometimes where there is a synergy or connection with a co-located business and often where the proprietor or the staff of that business live very locally. Often these include automotive and similar uses, which traditionally have not been seen as popular neighbours due to noise, smells and vehicle parking.
- 3.5.5 Sometimes there are good economic reasons for these occupations, but on other occasions, they are purely locational. Whilst rents, when measured on a £ per sq ft basis, are sometimes surprisingly high, they often include a contribution to shared services including insurance and business rates. Having said that, the units available are sometimes much smaller than those on regular industrial estates and therefore, the rent, when expressed on a weekly or monthly basis, is manageable for a small business.
- 3.5.6 It is clear that properties in this category provide a service and are an important part of the available property supply. Furthermore, it is clear that when changes take place, such as redevelopment, it can cause difficulties for small businesses that are trying to relocate and there is no similar provision either nearby, or elsewhere within a reasonable distance.
- 3.5.7 Changes to planning legislation have assisted the potential for conversion of farm buildings for use as retail, but better quality buildings can sometimes find alternative uses in office or residential, however, these would not sit comfortably with the less neighbourly uses described above and in certain circumstances, could result in squeezing out some of the more industrial or lower value uses.
- 3.5.8 We suspect that many of these locations will have established uses rather than been the subject of successful planning applications. However, the loss of these facilities can clearly cause considerable difficulty where there is little or no direct replacement.
- 3.5.9 A development of a rural employment site is likely to require infrastructure improvements, the cost of which may prove financially prohibitive, such as road improvements and availability of services. The lack of local amenities can tend to be an issue for both existing and proposed occupiers.
- 3.5.10 **Summary**
- 3.5.10.1 The rural industry plays a specialist role within the employment framework of Hampshire. Often the buildings/uses do not fit into a particular category and provide accommodation for small businesses and start-ups. In particular, they offer low-cost accommodation on flexible terms.

4.0 TEST VALLEY BOROUGH OVERVIEW

4.1 Location

4.1.1 The Borough of Test Valley extends to some 250 square miles of western Hampshire. It borders Southampton in the south and Newbury in the north. Test Valley is a predominantly rural area renowned for its natural beauty, encompassing the River Test and the North Wessex Downs.



4.1.2 Test Valley Borough has a population of 116,400 (2011 Census). The age structure has approximately 18.4% of pensionable age and over, compared with the national average of about 16.44%. Of those people who are of working age, statistics taken from the 2011 Census, show that Categories 1 (higher managerial, administrative and professional occupations), 2 (lower managerial, administrative and professional occupations) 3 (intermediate occupations) and 4 (small employers and own account workers) make up 62.3% of the workforce. Whilst those in Categories 5 (lower supervisory and technical occupations), 6 (semi-routine occupations), 7 (routine occupations) and 8 (never worked and long-term unemployed) make up 31.7% of the workforce. Full-time students make up 5.8%. These statistics compare with the national average of 53.5%, 37.5% and 9% respectively.

4.1.3 The southern part of the Borough is served by the M27 motorway, linking the region to Bournemouth and Poole in the west and Portsmouth and Chichester to the east. The northern region is served by the A303, which connects with the M3 motorway and A34 trunk road to the east and the M5 motorway to the west.

4.2 Industrial take-up and availability

4.2.1 Test Valley covers a wide geographical area from Andover in the north, to Nursling in the south. Andover is a major industrial/warehouse location, which has struggled during the recession from a significant number of voids and it is only in the last two years that there has been significant take-up, resulting in over 600,000 sq ft let or sold in 2014. Availability was at over 1 million sq ft in 2013, reducing to less than 800,000 sq ft in 2015. However, this has significantly increased recently with the completion of Angle 340°, a new 336,000 sq ft spec-built warehouse. Further speculative employment-related development is taking place on Walworth Business Park by Kier Property and Test Valley Borough Council. To the south of the Borough, there has been significant rental growth on the few voids that have taken place on Nursling Industrial Estate. Mack Ltd vacated 39,000 sq ft in Oriana Way, which was sold to

CBRE Global, refurbished and subsequently let to DFS Trading Ltd at a record rent of £8.50 per sq ft. There are currently only two voids of 30,000 sq ft and 18,000 sq ft.

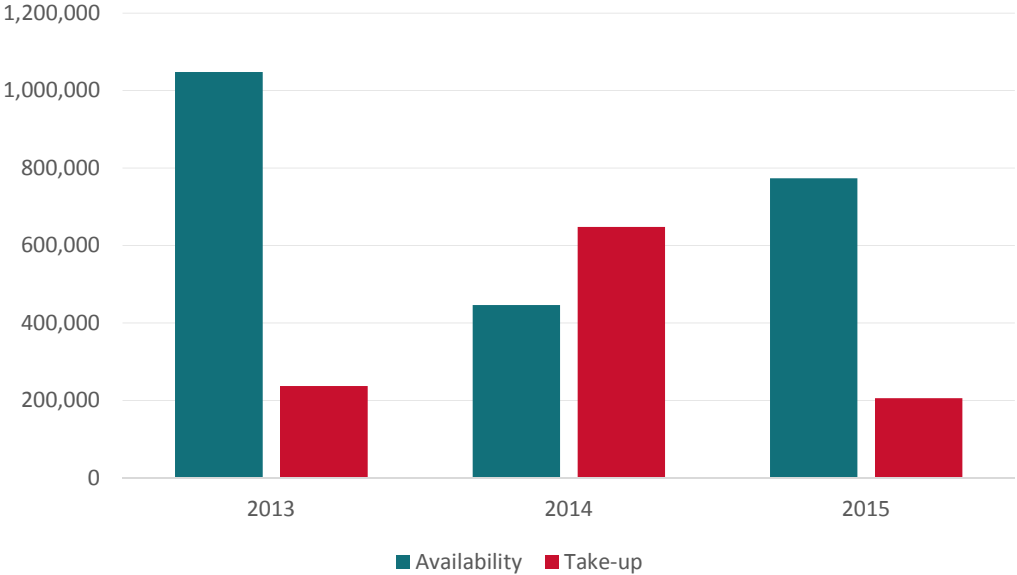


Figure 6 - Three-year industrial availability and take-up statistics for Test Valley Borough (Source: CoStar)

4.3 Key industrial estates within the Borough

4.3.1 **Andover Business Park** is located in the west of Andover, south of the A303 dual-carriageway and 2.4 miles from the town centre. It comprises a new development site of 56 acres for high-spec industrial, warehouse and distribution units, ranging in size from 25,000 sq ft to 600,000 sq ft. There is also consent for retail, leisure and trade uses on 6 acres of the site. The Co-operative occupy a new unit totalling 467,683 sq ft, and Stannah has also acquired 11.93 acres on the site for a new headquarters building. The new Angle 340^o units (336,000 sq ft) is also located on this site.

4.3.2 **Walworth Business Park and Walworth Business Park Extension (11ha), Andover** is situated to the 1.5 miles to the east of the town and is linked to the A303 dual-carriageway by the A3093 Churchill Way. The estate is well established and comprises a wide range of industrial and warehouse units of varying sizes and age. It is one of the key employment estates in Andover due to its proximity with the A303. A number of national occupiers such as Le Creuset (UK) Ltd, Twinings, Ocado and Londis are represented.

- 4.3.3 **Portway Business Park, Andover**, is located to the west of the town and has direct access to the A303 dual-carriageway. The estate is divided into two distinct areas, with buildings ranging in age from the mid-20th century through to more modern stock built in the last five to ten years. West Portway is fully serviced and provides a range of units up to circa 100,000 sq ft plus a retail, trade and showroom development, including McDonald's, Premier Inn and SCATS. East Portway is a large mixed-use estate comprising industrial, trade and office premises, including a 70 unit Basepoint Business Centre. Occupiers across the estate include Mitutoyo UK, Euronics, Howard Tenens Ltd, BP Rolls Ltd and Aegg Ltd.
- 4.3.4 **Abbey Park Industrial Estate, Romsey**, is located off the A27 Luzborough Lane and is approximately two miles east of Romsey town centre and 3.5 miles from the M27 motorway. Southampton International Airport is approximately six miles to the east. It is a modern estate, built approximately 25 years ago and includes an 80 unit Basepoint Business Centre offering a range of managed office and workshop units. Occupiers include Cedar Group, Schlumberger Oilfield UK, Talley Group, Regional Express, SHB Vehicle Hire and CDS Group Services.
- 4.3.5 **Romsey Industrial Estate/Budds Lane Industrial Estate, Romsey** is on the northern edge of the town and is accessed via the A3057 Stockbridge Road. Romsey town centre is located approximately half a mile to the south. These estates are popular with local businesses and are an amalgamation of smaller estates such as Frobisher Industrial Centre, Fernacre Business Park and Grove Business Park. As such, buildings range in age from the more traditional, older style property, through to more modern units on Fernacre Business Park, built in the early 2000s. Occupiers include Flack Manor Brewery Ltd, MG Metals Ltd, Wessex Lift Co Ltd, Skates.co.uk and P&B Autocentre.
- 4.3.6 **Nursling Estate, Nursling, Southampton** is accessed from the Junction 1 of the M271 motorway. Southampton Central Railway lies four miles to the south east, and Southampton International Airport is six miles to the east. The estate provides a wide range of industrial units dating from the 1960s onwards. There has not been any new employment-related development on the estate since the early 2000s. However, properties are generally refurbished as and when they become vacant. At the entrance to the estate is a retail warehouse scheme comprising Carpetright, Harvey's Furniture and B&Q plc. Industrial occupiers include TW Metals, TNT, Hermes, Pentagon Mercedes-Benz, CTC Aviation, CLF, Meachers Global Logistics and Tesco Distribution. There is a Local Plan planning policy restriction which restricts use of the site to storage distribution only.

4.4 Key industrial transactions

4.4.1 The table below provides details of significant industrial transactions in the Borough during the course of the last twelve months:

Address	Occupier/Purchaser	Landlord/Vendor	Size (sq ft)	Tenure	Rent (per sq ft)
Andover 303 East Portway Industrial Estate Andover	AET Transport Andover Ltd	Colesbourne Asset Management	94,818	LH	£4.50 (headline)
Unit 17-18 Oriana Way Nursling Industrial Estate Southampton	DFS Trading Limited	CBRE Investors	30,678	LH	£8.50
Unit 11 Oriana Way Nursling Industrial Estate Southampton	Redbridge Produce and Flowers Ltd	AXA	25,643	LH	£7.00
Plot 27B Walworth Business Park Andover	S&S Construction	Kier Property Developments Ltd	18,439	LH	£6.50
Meridian Park Andover	Indesit		30,000	LH	£6.50
Plot 56 Reith Way Andover	Vectaire		57,243	FH	£4.50

Table 5 - Key industrial transactions within Test Valley Borough during 2015

4.5 Office take-up and availability

4.5.1 Test Valley incorporates a number of key office locations; to the north of the Borough, Andover has a fairly limited office market, and much of the stock is older in style and configuration; whilst to the south and concentrated along the M27, between the M271 (Junction 3) and the M3 (Junction 4), there are significant office centres, including Hampshire Corporate Park, Southampton Science Park and Adanac Park, which accommodates the modern Ordnance Survey Headquarters and has the potential to provide further grade A office supply. Using 2015 figures, there is less than two years' supply of office space remaining within the Borough.

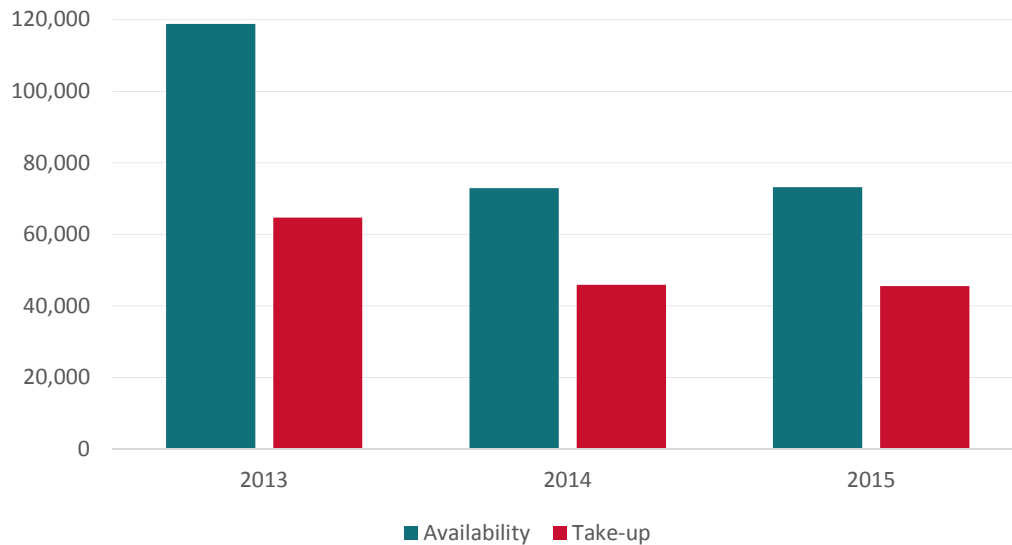


Figure 7 - Three-year office availability and take-up statistics for Test Valley Borough (Source: CoStar)

4.6 Key office locations

4.6.1 **University of Southampton Science Park, Chilworth** is situated one mile from Junction 14 of the M3 and is close to the M27 at Junction 5. Southampton International Airport and Southampton Airport Parkway railway station are within easy access, 4.5 miles to the east. The Science Park is located in an attractive landscaped, sustainable setting of 45 acres and provides high quality office and laboratory space to growing businesses. It comprises some 13 buildings, constructed since the early 1980s and is home to approximately 70 companies. The Park offers accommodation on flexible terms with high-speed fibre optic broadband, 24-hour advanced security, on-site facilities management and business support. The Park seeks to achieve an entrepreneurial community, concentrating on scientific and technology focused businesses.

4.6.2 **Adanac Park, Nursling, Southampton** is accessed from Junction 1 of the M271 and is four miles north of Southampton Central railway station, and six miles from Southampton International Airport. Adanac Park comprises circa 75 acres and is a strategic major employment site. It currently has outline planning for 825,000 sq ft of high quality office, research and manufacturing uses and is home to Ordnance Survey's headquarters, built in 2010, as well as a Holiday Inn Express.

4.6.3 **Hampshire Corporate Park, Chandlers Ford** was constructed in the late 1980s/early 1990s and provides circa 170,000 sq ft. It is well located in terms of road infrastructure, at the confluence of the M3/M27 motorways, within relative proximity of Southampton Airport Parkway railway station and the airport. It has good parking and reasonable access to local amenities within Chandlers Ford and Southampton. The office park provides larger floor plate

sizes suitable for corporate occupiers. However, buildings are at the point in their lifecycle where investment is required to bring them up to modern standards.

4.7 Key office transactions

4.7.1 The table below provides details of significant office transactions in the Borough during the course of 2015:

Address	Occupier/Purchaser	Landlord/Vendor	Size (sq ft)	Tenure	Rent (per sq ft)
Phi House Southampton Science Park	Chilworth Technology Ltd	Southampton Science Park	16,600	LH	£16.00
Kingsgate House Newbury Road Andover	Cloudpay UK Ltd	Lionel Hitchen (Essential Oils) Ltd	8,008	LH	£13.50 (asking)
Kingsgate House Newbury Road Andover	GW Pharmaceuticals	Lionel Hitchen (Essential Oils) Ltd	3,113	LH	£13.50 (asking)

Table 6 - Key office transactions within Test Valley Borough during 2015

4.8 Summary of Test Valley Borough site reviews

Reference	Site name/address	Grade A-E	Quality
TV18	South of Brownhill Way	A	High
TV13	University of Southampton Science Park	B	Above average
TV16	Nursling Estate	B	
TV01	Andover Business Park (aka Andover Commercial Park or Andover Airfield)	B	
TV17	Hampshire Corporate Park	B	
TV23	Bargain Farm	B	
TV15	Adanac Park	B	
TV09	Abbey Park Industrial Estate, Premier Way	B	
TV27	Weyhill Fairground	B	
TV22	University of Southampton Science Park Extension	C	
TV04	East Portway Business Park	C	
TV05	West Portway Business Park	C	
TV02	Walworth Business Park	C	
TV08	Glenmore Business Park, Colebrook Way	C	
TV06	Meridian Park, Greenwich Way	D	Below average
TV07	Anton Mill Trading Estate, Anton Mill Road	D	
TV10	Romsey Industrial Estate (aka Greatbridge Industrial Estate)	D	
TV19	Belbins Business Park	D	

Reference	Site name/address	Grade A-E	Quality
TV11	Budds Lane Industrial Estate	D	
TV26	Harewood Forest Industrial Estate	D	
TV14	Test Valley Business Park	D	
TV24	Weyhill Business Park	D	
TV03	Walworth Business Park Extension	D	
TV28	Mayfield Avenue Industrial Estate	D	
TV25	Dean Hill Park	E	Low
TV12	Whitenap	E	
TV20	Wynford Industrial Park, Belbins	E	
TV21	Yokesford Hill Industrial Estate, Belbins	E	

Table 7 - Summary of Test Valley Borough land study, including scoring assessment

- 4.8.1 The north-south linear shape of Test Valley district, revolving around the two distinct and very different towns of Andover and Romsey, ensures that there are two distinct characters, and this is the case in terms of the business space proposition in the Borough.
- 4.8.2 The northern area around Andover, orientated around the A303 east/west route, panders towards the logistics and distribution market; whereas Romsey has a few small industrial estates, which cater for largely local and regional occupiers. On the other hand, the southern area of the Borough, around Nursling and Adanac Park, has a much stronger connection to Southampton Docks and the Southampton economy and accommodates many regional and national operators. Both towns have a limited demand for offices, which tend to be for local occupiers. However, all of the business-park-type office development is located close to the boundary with the City of Southampton at Hampshire Corporate Park, Southampton University Science Park and Adanac Park.
- 4.8.3 The industrial locations in the Andover area have had a poor reputation in the past, due to the long leasehold nature of major sites and inflexibility of leases in relation to redevelopment and alienation provisions. Matters have improved more recently due to the development of a partnership arrangement with Kier, which has prompted recent positive activity on a number of levels.
- 4.8.4 The A303 has been recognised as a major distribution artery. New employment-related development at Solstice Park in adjoining Wiltshire, the development at Walworth for Ocado and the new Co-op Distribution Centre at Andover Business Park have made a significant contribution to economic development in the area.
- 4.8.5 Nursling is restricted to warehousing and distribution (B8) and originally, was restricted to Port related uses, although a limited number of personal consents to user changes were allowed. In our view, this has held development back.

- 4.8.6 Adanac Park is restricted in planning terms to B1 use, an approach that has been upheld by the Planning Inspectorate. The only significant development to take place over a long period is that of the Ordnance Survey headquarters. The market for warehousing and logistics has been strong over the last few years, which is shown by the two developments mentioned in paragraph 6.8.4 above and by the development of the new Lidl Distribution Centre immediately to the south. Recently, the planning situation has become more flexible, but there remains an embargo on B8 development here, which has, until now been contrary to demand, which has been strong in this area, close to Southampton Docks and the M27/M271 motorway. In our opinion, Adanac Park should not be restricted solely to headquarters buildings, but be available for all employment uses, particularly those which require access to the motorway system and to the Port of Southampton, so long as the quality of the development approved is at a high level, commensurate with its surroundings and market demand.
- 4.8.7 The newly proposed employment-related development on the Southampton City Council site in Test Lane South, close to the Borough boundary, will satisfy some of the latent demand.
- 4.8.8 It has been noted that there has been limited new employment-related development in the Borough over the past ten years, but all the 'A' (High) and 'B' (Above average) graded sites are modern and have seen some new build or refurbishment in the last five years or so. The suitability for purpose and quality of the buildings and the sites are of primary importance. However, the proximity to transport infrastructure is very high on the list of desirability and criteria.
- 4.8.9 A number of the industrial sites, even those with 'B' (Above average) ratings, experience varying proportions of older style buildings in need of refurbishment and sometimes, suffer from a higher level of site coverage than would be proposed or desired now. Especially for units of more than 15,000 sq ft, where there is a desire to have secure yard space for the exclusive use of the occupier.
- 4.8.10 A number of the sites in the 'C' (Average), 'D' (Below average) and 'E' (Low) categories are lacking in prominence and profile. Some are close or adjacent to residential areas and may be sensitive to complaints of noise, disruption or 24-hour operation.
- 4.8.11 In future, development planning should allow, where possible, for a range of tenures as the market needs to be able to offer freehold and long leasehold opportunities, in addition to the standard 'institutional style' leasehold premises. This is particularly true in relation to owner-managed businesses (freehold or long leasehold preferred) and start-ups (short-term flexible tenure preferred).

4.8.12 From the ranking schedule, it is clear that the rural locations score poorly, but this is because they have failings in several categories. However, they still have a rightful and important place in the market, and schemes of this type should potentially be protected to satisfy demand.

5.0 GLOSSARY OF TERMS

Alienation	<i>The legal transfer of title of a lease by assigning or subletting to another party.</i>
Amenities	<i>The availability of nearby shopping, food and drink establishments (including bars, restaurants and coffee shops), supermarkets and leisure activities such as gyms, cinema and jogging tracks.</i> <i>Amenities within a building could include cycle storage, showers, gym/fitness centre, café/coffee shop, parking, high-speed internet</i>
Availability	<i>The amount of built space, currently being marketed as available to purchase or lease.</i>
Brownfield	<i>Previously developed land.</i>
Building fundamentals	<i>These would include benefits such as location, high quality specification, market leading parking ratios and access to good surrounding amenities.</i>
Capital values	<i>The value of an asset, freehold or leasehold, as opposed to its rental value</i>
Floor plate	<i>An open area of contiguous space on one floor of a building (usually applied to an office building).</i>
Freehold	<i>The most superior legal title to the ownership of premises - legally referred to as "fee simple absolute in possession" - as opposed to long leasehold (or ground lease) which will often run for 100 years or more, and leasehold (usually the occupational lease interest). For an estate to be a freehold it must possess two qualities: immobility (property must be land or some interest issuing out of or annexed to land); and ownership of it must be of an indeterminate duration.</i>
Grade A	<i>Used to categorise the quality of office space. Grade A space is the best quality office space with a high standard of specification, usually newly constructed or recently extensively refurbished. Lower quality offices would be described as Grade B or Grade C.</i> <i>Industrial and logistics space is categorised as either Prime or Secondary space. Prime space is the best quality space with a high standard of specification, usually constructed within last five to ten years, or recently extensively refurbished. The specification would generally include an eaves height of over 8m, 5-10% office content, electric loading doors, good parking ratio, good location and access to national road network.</i>
Ground lease	<i>This is usually a long lease, granted at a ground rent, which sometimes can attract an initial premium payment. A ground lease can vary in length up to 999 years.</i>
Headline rent	<i>A headline rent is the rent that is paid under a lease, after the end of any rent-free periods or any period of reduced rent. It creates an artificially inflated rent by ignoring the rent-free period, period of reduced rent or any other concessions the landlord may have given to the tenant in return for a higher headline rate. Headline rent is most commonly associated with open market lettings, but increasingly at lease renewal and lease re-gearing/restructuring. Headline rent usually also forms the benchmark for any "upward only" rent review in the lease</i>
Incentive	<i>An incentive is a payment that is used to encourage a tenant to take on a new leasehold contract when a lease is granted or assigned. For example where a landlord pays a tenant a sum of money to contribute to the cost of a tenant's fit-out or allows a rent free period.</i>
Leasehold	<i>The Law of Property Act 1925 simplified the conveyancing process by creating two "estates" or interests in land.</i>
M27 Corridor	<i>The Cities and Towns located along the M27 motorway, including Southampton, Eastleigh, Fareham and Portsmouth.</i>
Mid-box unit	<i>Industrial and logistics properties of between 50,000 sq ft and 100,000 sq ft.</i>



Mixed-use development	<i>A type of development which blends commercial, residential, retail, cultural and leisure uses.</i>
Multi-let	<i>A property or estate that is owned by a single entity and leased to multiple occupants.</i>
Net effective rental value	<i>The equivalent rent that would be payable after all incentives (for example capital contributions and rent free periods) are taken into consideration. This calculation is used by the VOA to determine the actual Rateable Value. It is also used in lease negotiations to identify the appropriate level of rent.</i>
Occupancy rates	<i>Built-space which is occupied by a tenant or owner-occupier. Occupancy rates do not include properties purchased for investment purposes, which are unoccupied.</i>
Open Market letting	<i>A property which has been offered 'to let'</i>
Parking ratios	<i>The number of parking spaces available per 1,000 sq ft of leased accommodation. Typically, 'best' parking ratios for out-of-town offices would be 1:150 sq ft to 1:200 sq ft, whilst 'best' ratios for city centre offices would be 1:1,000 sq ft.</i>
Permitted Development Rights	<i>Permission to carry out limited forms of development without the need to make a planning application under the terms of the Town and Country Planning (General Permitted Development) Order.</i>
Pre-let	<i>The letting of a property, which is agreed prior to the completion of the building's construction.</i>
Prime	<i>Used to categorise the quality of industrial and logistics space. Prime space is the best quality industrial and logistics space with a high standard of specification, usually constructed within last five to ten years, or recently extensively refurbished. Specification would generally include over 8m eaves height, 5-10% office content, electric loading doors, good parking ratio, good location and access to national road network. Lower quality industrial and logistics space would be described as secondary.</i>
Quoting rent	<i>The rent quoted to potential occupiers by letting agents, on either a per sq ft/sq m or per annum basis, in respect of a vacant property.</i>
Rental values	<i>The amount of rent a tenant pays annually for the right to occupy and use real property under agreed contractual conditions.</i>
Speculative development	<i>A development which has commenced without a secured tenant or purchaser in place.</i>
Supply	See Availability
Take-up	<i>The measurement of the amount of space leased or sold within a given period.</i>
Use Class	<i>The category of Town Planning Use to which the current or intended use of a property is allocated, as defined in the Town and Country Planning (Use Classes) Order 1987. This is a Statutory Instrument and is subject to periodic variation and updating.</i>
Vacancy level	<i>The total amount of unoccupied space, divided by the total amount of existing floor space and expressed as a percentage.</i>
Voids	<i>A term used to describe costs of property that are unrecoverable due to vacancy.</i>
Yield	<i>A measure of the return on an investment. A yield is the reciprocal of the multiplier that converts an income stream into a capital value.</i>
Yield compression	<i>When market conditions improve and yields reduce, creating a commensurate increase in capital value.</i>

APPENDIX 1

Site Scores and Assessment Criteria

Reference	Site name/address	Strategic Location 1	Layout/ Prominence 2	Area Character 3	Local Amenities 4	Planning Status 5	Occupier Perception 6	Age/ Suitability 7	Redevelopment Prospects 8	Total score	Grade A-E
Test Valley											
TV18	South of Brownhill Way	5.0	5.0	4.0	4.0	5.0	5.0	5.0	5.0	38.0	A
TV13	University of Southampton Science Park	4.0	5.0	5.0	3.0	4.0	4.5	4.0	5.0	34.5	B
TV16	Nursling Estate	5.0	4.0	5.0	3.5	5.0	5.0	3.0	3.0	33.5	B
TV01	Andover Business Park (aka Andover Commercial Park or Andover Airfield)	4.0	4.0	4.0	2.0	5.0	4.0	5.0	5.0	33.0	B
TV17	Hampshire Corporate Park	4.0	4.0	4.0	4.0	4.0	4.0	3.5	5.0	32.5	B
TV23	Bargain Farm	5.0	4.0	5.0	3.0	3.0	4.0	4.0	4.0	32.0	B
TV15	Adanac Park	5.0	5.0	5.0	3.0	4.0	4.0	4.0	1.5	31.5	B
TV09	Abbey Park Industrial Estate, Premier Way	4.0	3.0	4.0	2.0	5.0	4.0	4.0	4.0	30.0	B
TV27	Weyhill Fairground	3.0	4.0	3.0	3.0	4.0	4.0	4.0	5.0	30.0	B
TV22	University of Southampton Science Park Extension	4.0	4.0	4.5	3.0	3.0	3.0	5.0	1.5	28.0	C
TV04	East Portway Business Park	4.0	3.0	4.0	2.0	5.0	3.0	3.0	2.5	26.5	C
TV05	West Portway Business Park	4.0	3.0	4.0	2.0	5.0	3.0	3.0	2.5	26.5	C
TV02	Walworth Business Park	4.0	3.0	4.0	2.0	5.0	3.0	3.0	2.0	26.0	C
TV08	Glenmore Business Park, Colebrook Way	2.0	3.0	3.0	2.0	3.0	3.5	4.0	5.0	25.5	C
TV06	Meridian Park, Greenwich Way	3.0	3.0	3.0	2.0	4.0	3.0	3.0	3.5	24.5	D
TV07	Anton Mill Trading Estate, Anton Mill Road	3.0	3.0	3.0	4.0	3.0	3.0	2.5	3.0	24.5	D
TV10	Romsey Industrial Estate (aka Greatbridge Industrial Estate)	2.0	3.0	4.0	2.0	3.0	3.0	2.0	4.0	23.0	D
TV19	Belbins Business Park	2.0	3.0	2.5	1.0	3.0	3.0	3.5	5.0	23.0	D
TV11	Budds Lane Industrial Estate	2.0	2.0	4.0	2.0	3.0	3.0	2.0	4.0	22.0	D
TV26	Harewood Forest Industrial Estate	4.0	4.0	2.0	1.0	3.0	3.0	2.0	3.0	22.0	D
TV14	Test Valley Business Park	3.0	3.0	3.0	2.0	3.0	3.0	3.0	1.5	21.5	D
TV24	Weyhill Business Park	3.0	2.0	1.5	2.0	3.5	3.0	3.5	3.0	21.5	D
TV03	Walworth Business Park Extension	4.0	2.0	4.0	2.0	4.0	3.0	1.0	1.0	21.0	D
TV28	Mayfield Avenue Industrial Estate	3.0	2.0	3.0	1.0	3.0	3.0	2.0	4.0	21.0	D
TV25	Dean Hill Park	1.0	1.0	2.0	2.0	3.5	3.0	3.0	3.0	18.5	E
TV12	Whitenap	1.0	1.0	2.0	2.0	3.0	2.0	2.0	3.0	16.0	E
TV20	Wynford Industrial Park, Belbins	2.0	2.0	2.0	1.0	3.0	2.0	1.0	3.0	16.0	E
TV21	Yokesford Hill Industrial Estate, Belbins	2.0	2.0	2.0	1.0	3.0	2.0	1.0	3.0	16.0	E

EMPLOYMENT LAND STUDY

Assessment criteria and guide to scoring system for site classification (Grade A-E)

1. Strategic location/accessibility

Score	Possible Indicators
5 High	Adjoining main road or motorway junction; easy access for all vehicles; access to rail, air or sea networks.
4 Above Average	Close to major road network; easy access for all vehicles.
3 Average	Reasonable site access for all vehicles; indirect or restricted access to major road network.
2 Below Average	Restricted access for HGV's; restricted access to major road networks.
1 Low	Restricted access for all commercial vehicles; severely limited access to major road networks.

2. Estate layout/prominence

Score	Possible Indicators
5 High	Designed to modern standard; attractive landscaping and environment; very easy manoeuvring; no obstructions; Gateway site; visible from major road network.
4 Above Average	Acceptable design; adequate landscaping and environment; easy manoeuvring; no obstructions; visible site; on a main road or prominent site.
3 Average	Acceptable design with some limitations; inadequate landscaping; manoeuvring compromised; obstructions; on a main road or prominent estate but tucked away from view.
2 Below Average	Poor design, old standard with limitations; inadequate landscaping and manoeuvring restricted; obstructions; visible on a minor road or estate.
1 Low	Historic design and unacceptable layout; no landscaping and manoeuvring severely restricted; obstructions; on a minor road or estate tucked away from view.

3. Character of area/neighbouring uses

Score	Possible Indicators
5 High	Well established commercial area; compatibility and uniformity of uses.
4 Above Average	Established commercial area; mainly compatible and uniformity of uses.
3 Average	Mixed commercial area with residential nearby; mainly compatible uses.
2 Below Average	Mainly residential with few commercial uses; incompatible uses.
1 Low	Mainly residential with very few commercial uses; non-conforming uses.

4. Local amenities/public transport

Score	Possible Indicators
5 High	Close to a wide range of employment related services (e.g. shops, leisure/recreation, pubs/restaurants, banks); close to a station, peak time bus route and cycle route, on a pedestrian route. NB: 'Close' = within about 10 minutes' walk.
4 Above Average	Close to a reasonable range of employment related services; close to a station, peak time bus route and cycle route, on a pedestrian route.
3 Average	Close to a limited range of basic services; close to either a station, bus route or cycle route, on a pedestrian route.
2 Below Average	Close to one or two basic services; not near a station, bus route nor cycle route, not on a pedestrian route.
1 Low	No services in close proximity; not on a pedestrian route, not near a station, bus route nor cycle route.

5. Planning status

Score	Possible Indicators
5 Good	Detailed or outline permission; use flexibility; compliant.
3 Satisfactory	Local Plan allocation or protected site; mainly compliant but some un-neighbourly uses.
1 Poor	No allocation; non conforming uses; suit change of use to non 'B' class employment.

6. Occupier perception/property values

Score	Possible Indicators
5 High	Highly regarded; very good market appeal; attracts and achieves prime values.
4 Above Average	Well regarded; good market appeal; attracts close to prime values.
3 Average	Displays market appeal; day to day churn; attracts secondary values.
2 Below Average	Occupier resistance; limited market appeal; longer void rates; command below secondary values.
1 Low	Virtually no market appeal; occupiers highly reluctant; longest void periods; tertiary values.

7. Age and suitability of built stock (fit for purpose)

Score	Possible Indicators
5 High	Built 2000 onwards; quality as 'Grade A' specification to attract national/corporate occupiers; FRI or close to condition: Industrial - 6.5m plus eaves; adequate loading and parking Offices – open plan accommodation on single floor plates, air-conditioning, excellent car parking ratio and fibre optic connectivity.
4 Above Average	Mainly built 1990's onwards; modern specification may attract national occupiers; FRI or 75% condition. Industrial - 6m plus eaves; adequate parking and loading; Office – mainly open plan accommodation, air-conditioning, good car parking ratio and broadband connectivity.
3 Median	Mainly built 1980's onwards; adequate specification, more suitable to local businesses. Industrial - 5m to eaves upwards; adequate loading and parking. Office - mainly open plan accommodation, air-conditioning, adequate car parking ratio and broadband connectivity.
2 Below Average	Built before 1980; inadequate specification compared to modern units, suitable to local businesses and un-neighbourly uses. Industrial - 5m eaves or below; poor loading and parking; Office – cellular offices, minimal parking and basic fitout.
1 Low	Built before 1980; inadequate specification suitable for refurbishment or redevelopment; only attract smaller, local businesses with un-neighbourly uses.

8. Re-development prospects and constraints

Score	Possible Indicators
5 Very Low	Building too modern to redevelop; OMV (Open Market Value) far exceeds site value.
4 Long Term	Unlikely within next 25 years; OMV exceeds site value.
3 Medium Term	Potential to redevelop within 15-25 year timescale; OMV closer to site value.
2 Short Term	Redevelopment likely within 5-15 year period; OMV marginally above site value.
1 Very High	Redevelopment highly likely within next 5 years; limited constraints; site value equal or exceeds OMV of existing buildings.

Scoring – overall classification

	Quality	Total Score
Grade A	High	35 and over
Grade B	Above Average	30-34.5
Grade C	Average	25-29.5
Grade D	Below Average	20-24.5
Grade E	Low	19.5 and under

APPENDIX 2

Test Valley Borough Site Proformas

Site Name: Andover Business Park (aka Andover Commercial Park or Andover Airfield)			
Site Ref:	TV1		
Borough:	Test Valley Borough Council	Size (ha)	44.9
Description of Site and Location:	Andover Business Park is located 2.4 miles from the town centre and benefits from direct access to the A303 dual carriage way. It provides industrial and warehouse units from 25,000-600,000 sqft.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	Yes		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	Yes		
Market Appraisal	<p>The site is owned by Goodman's, who are a logistics developer and comprises 44.9 acres in total of which a small section was sold to Stannah some years ago. 32.5 acres was pre-let to The Co-op for a 467,000 sq ft unit. A further plot has been speculatively developed (336,000 sq ft unit). In addition, there are roadside plots at the front, which have been developed in parts as hotel, care home and public house. A further 3.5 acres is undeveloped and available for uses such as drive through, self storage, nursery, car showroom, trade units, builder's merchants, leisure, petrol station, convenience store, gym and retail uses.</p> <p>The site is situated in a key location as adjacent to A303, which provides excellent connections to the motorway network.</p>		
Adjacent land use and conflicts	A303 to the north; agricultural to the west; Armies Families Federation to the south		
Known constraints and infrastructure requirements	None.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	Policy LE9 of the Borough Local Plan identifies the site for employment uses		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	Planning permission has been granted for a hotel and a manufacturing unit and warehouse		

<p>2.3: Is the site part of a comprehensive or long term development or regeneration proposal?</p>	<p>The site is earmarked for development. Policy LE19 identifies appropriate uses for the site; i.e. B1, B2 and B8.</p>
<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>Public funding in the form of s106 monies has been secured to deliver road infrastructure improvements to local highways in the vicinity of the site.</p>
<p>Strategic Planning and Access</p>	<p>A transport mitigation package has been secured in the form of s106 to address local highways issues.</p>
<p>Recommendation</p>	<p>Site score: B – above average</p> <p>This site is ripe for development, pending occupier demand and funding. This site should be proactively managed.</p>

Site Name: Walworth Business Park			
Site Ref:	TV2		
Borough:	Test Valley Borough Council	Size (ha)	83.3
Description of Site and Location:	Walworth Business Park lies adjacent to the A303 on the eastern side of Andover close to the town ring road. The business park is located close to the M3 motorway and the A34 trunk road providing good road communications to London and the midlands, as well as Southampton and its busy port and international airport to the south.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		Yes	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		JV between Kier & TVBC	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Yes	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		Individual plots available	
Market Appraisal	<p>The freehold of the estate is owned by TBVC with individual plots owned LLH by institutional investors, property companies and local business occupiers.</p> <p>Walworth Business Park is a popular estate on the periphery of Andover. It comprises a mix of B1, B2 and B8 properties, which range in size and age, from small start-up units to much larger ones. Older properties are generally refurbished and upgraded as they become vacant.</p> <p>There has been refurbishment of individual plots, following void periods.</p> <p>Kier developments are speculatively constructing a 50,000 sq ft headquarters unit, which has consent for B1, B2 and B8 use. Construction is due for completion in Q3 2016.</p>		
Adjacent land use and conflicts	Residential to the west; agricultural and railway lines to the north, playing fields to the east.		
Known constraints and infrastructure requirements	None.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		The site comprises the largest consolidation of employment uses in the Borough	

<p>2.2: Is the site identified or likely to be required for a specific user or specialist use?</p>	<p>Due to the proximity of the strategic road network; employment uses in particular storage and logistics would benefit from the site's accessible location.</p>
<p>2.3: Is the site part of a comprehensive or long term development or regeneration proposal?</p>	<p>A public-private partnership has been established to deliver the long-term proposals to regenerate the site</p>
<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>Currently there is not sufficient capacity in the electricity network to meet future requirements. Private investment by the utility supplier is required to upgrade the infrastructure in the Andover area.</p>
<p>Strategic Planning and Access</p>	<p>The current identified constraint concerns the capacity of the electrical network in the area as set out in the Infrastructure Delivery DPD.</p>
<p>Recommendation</p>	<p>Site score: C – average</p> <p>Walworth is a strategic employment site with ongoing refurbishment and redevelopment programme. It should be protected for continued employment uses.</p>

Site Name: Walworth Business Park Extension			
Site Ref:	TV3		
Borough:	Test Valley Borough Council	Size (ha)	11.1
Description of Site and Location:	Walworth Business Park lies adjacent to the A303 on the eastern side of Andover close to the town ring road. The business park is located close to the M3 motorway and the A34 trunk road providing good road communications to London and the midlands, as well as Southampton and its busy port and international airport to the south.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		South plot is North plot no	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		South plot – yes North plot – no	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		South plot – yes North plot - no	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		South plot – yes North plot - no	
Market Appraisal	<p>The site adjoins Walworth Business Park to the west and is an extension to the joint venture which Kier Property and TVBC development. Kier Property and TBVC own the southern plot, which is currently being marketed by LSH and JLL for a B1 or B8 development.</p> <p>The northern plot is owned by a farmer and it is therefore, unlikely that it will be brought forward for development in the foreseeable future.</p>		
Adjacent land use and conflicts	Business Park to the west; residential to the east; agricultural to the north and south.		
Known constraints and infrastructure requirements	The site is currently used as playing fields and is between an established Business Park and new residential development so there may be constraints on development from the adjoining residential however, 24/7 use will be key to prospective occupiers to bring forward new development. Road improvements to Walworth Road may be required and no right turn for HGV use restriction		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		A Strategic Site Allocation in the Local Plan	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		Due to the proximity to the strategic road network, employment uses in particular storage and logistics would benefit from the site's location.	

2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Formal planning guidance has been issued for the site.
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known
Strategic Planning and Access	The site is critical to the delivery of future employment floor space requirements set out in PUSH. The Infrastructure Delivery Plan DPD, identifies a potential constraint to the expansion of Walworth Business Park; in terms of the capacity of the electrical network in the area.
Recommendation	<p>Site score: D – below average</p> <p>There is a current application for outline planning permission for B1 & B8 use on this site</p>

Site Name: East Portway Business Park			
Site Ref:	TV4		
Borough:	Test Valley Borough Council	Size (ha)	26.2
Description of Site and Location:	East Portway Business Park is situated on the western side of Andover and is located 5 mins from the A303 trunk road. The A303 links directly to the M3 at J8, approx. 20 miles to the east. The Business Park covers an area of some 75 hectares and accommodates nearly 200 units.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Yes	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Yes	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		No	
Market Appraisal	<p>East Portway is understood to be owned by the Local Authority, Test Valley Borough Council. The majority of sites/units are therefore, held on LLH interests with geared ground leases. There is a mix of employment related uses on the estate. Properties on the estate are predominately 1970s/1980s built and are either let by institutional/property companies or owner-occupied.</p> <p>There is reasonably good access to the estate from the A303.</p>		
Adjacent land use and conflicts	Residential on the perimeter of the site. Freehold of site is held by Test Valley Business Council, therefore any redevelopment of the area would be subject to the lease terms and Test Valley Borough Council's approval.		
Known constraints and infrastructure requirements	None, so far as aware.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		The site is an allocated strategic employment site.	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		General employment use/ warehousing and distribution	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		Unaware of specific development proposals for the regeneration of the site.	
2.4: Is there public funding committed (or likely to be provided) sufficient to		It is unclear if there	

<p>overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>is public funding committed. A public/private partnership would be an appropriate vehicle to overcome any constraints that may arise in the future.</p>
<p>Strategic Planning and Access</p>	<p>The site contributes significantly to the economic performance of the Borough.</p>
<p>Recommendation</p>	<p>Site score: C – average</p> <p>As mentioned above, the site plays a significant part in the economic performance of the Borough and should therefore, continue to be managed as an employment estate.</p>

Site Name: West Portway Business Park			
Site Ref:	TV5		
Borough:	Test Valley Borough Council	Size (ha)	49.7
Description of Site and Location:	West Portway Business Park is situated on the western side of Andover and is located 5 mins from the A303 trunk road. The A303 links directly to the M3 at J8, approx. 20 miles to the east. The Business Park covers an area of some 75 hectares and accommodates nearly 200 units		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Yes	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Yes	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		No	
Market Appraisal	<p>West Portway is understood to be owned by the Local Authority, Test Valley Borough Council. The majority of sites/units are therefore, held on LLH interests with geared ground leases. There is a mix of employment related uses on the estate. Properties on the estate are predominately 1970s/1980s built and are either let by institutional/property companies or owner-occupied.</p> <p>There is reasonably good access to the estate from the A303.</p>		
Adjacent land use and conflicts	Freehold of site is held by Test Valley Business Council, therefore any redevelopment of the area would be subject to the lease terms and Test Valley Borough Council's approval.		
Known constraints and infrastructure requirements	None, so far as aware.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		A designated strategic employment site.	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		Given the site's close proximity to the strategic road network, the site would suit warehouse and distribution firms.	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		Not known	

<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>Not known</p>
<p>Strategic Planning and Access</p>	<p>The site provides a significant quantum of employment floor space and contributes to the borough's floor space requirements.</p>
<p>Recommendation</p>	<p>Site score: C – average</p> <p>As mentioned above, the site plays a significant part in the economic performance of the Borough and should therefore, continue to be managed as an employment estate.</p>

Site Name: Meridian Park, Greenwich Way			
Site Ref:	TV6		
Borough:	Test Valley Borough Council	Size (ha)	6.5
Description of Site and Location:	Meridian Park is located on Greenwich Way off Newbury Road on the Northern outskirts of Andover within close proximity to the ring road which lead onto the A303 dual carriage way.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		Yes	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Not known	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Not known	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		No	
Market Appraisal	Recently, there has been a new industrial/warehouse development on the western end of the site, which comprised a single unit let to Indesit in 2015.		
Adjacent land use and conflicts	Residential and a small amount of employment use.		
Known constraints and infrastructure requirements	None, as far as known.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		A designated Strategic Employment Site in the Local Plan.	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		Relatively good access to the road network. The site would suit a range of employment uses, in particular, warehouse and distribution.	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		Unaware of specific development proposals to regenerate the site.	

<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>No specific infrastructure requirements identified.</p>
<p>Strategic Planning and Access</p>	<p>The site currently contributes to meeting the Borough's employment floor space targets.</p>
<p>Recommendation</p>	<p>Site score: D – below average</p> <p>The site provides a mixture of employment related uses and should be managed as such.</p>

Site Name: Anton Mill Trading Estate, Anton Mill Road			
Site Ref:	TV7		
Borough:	Test Valley Borough Council	Size (ha)	2.9
Description of Site and Location:	Anton Mill Trading Estate is located off Western Avenue A3057 and A303 which surrounds Andover Town Centre.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Not known		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	No		
Market Appraisal	The site is located in a central location to Andover town centre, surrounded by a mix of residential, retail and leisure uses.		
Adjacent land use and conflicts	There is limited access to the site, via residential roads and this could cause potential HGV access issues and restrictions on hours of use, for any future re-development.		
Known constraints and infrastructure requirements	The site is 'remote' from the main A303 trunk road.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	A designated Strategic Employment Site in the Local Plan.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	Located in close proximity to the road network, the site is in particular suitable for warehouse and distribution uses.		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Unaware of any specific proposals to regenerate the trading estate.		

<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>Unaware of any infrastructure requirements related to the site.</p>
<p>Strategic Planning and Access</p>	<p>The site contributes to the employment floor space requirements in the borough.</p>
<p>Recommendation</p>	<p>Site score: D – below average</p> <p>Given the location of the site, there may be pressure in the future from alternative higher value uses on this employment site. The site should be proactively managed, should any opportunities arise in the future.</p>

Site Name: Glenmore Business Park, Colebrook Way			
Site Ref:	TV8		
Borough:	Test Valley Borough Council	Size (ha)	3.4
Description of Site and Location:	Glenmore Business Park is located at the end of Colebrook Way off Weyhill Road, about 1 mile from Andover town centre and the A303 dual carriage way.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Yes
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	<p>Glenmore Business Park has been developed in the last 5-10 years by Glenmore Developments and comprises a number of smaller business units, circa 1,000 to 10,000 sq ft. It is suited towards smaller industrial/manufacturing businesses and plays an important role within the smaller end of the market.</p> <p>It is located 2.5 to 3 miles to the east of the A303, therefore providing good road communications.</p>		
Adjacent land use and conflicts	Predominantly residential with school playing fields to the south of the site and agricultural silos to the west.		
Known constraints and infrastructure requirements	None so far as we are aware.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			A designated Strategic Employment Site in the Local Plan.
2.2: Is the site identified or likely to be required for a specific user or specialist use?			The site is suitable for variety of employment uses.
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Unaware of any specific regeneration proposals for the site.

<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>N/A</p>
<p>Strategic Planning and Access</p>	<p>The site contributes to meeting floor space requirements in the borough.</p>
<p>Recommendation</p>	<p>Site score: C – average</p> <p>This is a strategic employment site and should therefore be managed as such.</p>

Site Name: Abbey Park Industrial Estate, Premier Way			
Site Ref:	TV9		
Borough:	Test Valley Borough Council	Size (ha)	11.6
Description of Site and Location:	The site is situated in a semi-rural location to the north of J3 of the M27 motorway and to the east of Romsey town centre.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	The estate was predominantly developed in the 1980/90s on a site-by-site basis and is now owned by a mix of owner-occupiers, institutional investors and property companies. There is a wide mix of units developed on this estate, including a Basepoint Centre and larger 40,000 sq ft units.		
Adjacent land use and conflicts	Farmland surrounding.		
Known constraints and infrastructure requirements	None so far as we are aware.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			A designated Strategic Employment Site in the Local Plan.
2.2: Is the site identified or likely to be required for a specific user or specialist use?			The site is suitable for a variety of employment uses.
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Not aware of any specific regeneration proposals for the site.
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			No identified infrastructure requirements pertaining to the site

Strategic Planning and Access	The site is a designated Strategic Employment Site in the Local Plan and contributes to the employment floor space targets set out in PUSH.
Recommendation	Site score: B – above average This estate plays an important role within the local economy and should therefore be managed as an employment estate.

Site Name: Romsey Industrial Estate (aka Greatbridge Industrial Estate)			
Site Ref:	TV10		
Borough:	Test Valley Borough Council	Size (ha)	8.4
Description of Site and Location:	The site is situated to the north of Romsey town centre and J3 of the M27 motorway. It is one of the main industrial locations in Romsey.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	No		
Market Appraisal	There are a number of dated industrial/warehouse units built from the 1960s onwards.		
Adjacent land use and conflicts	To the east, south and west of the site is residential properties, including a railway line to the west. To the north is farmland.		
Known constraints and infrastructure requirements	Access to the site is restricted via a railway bridge with height and width restrictions (4.3m).		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	A designated Strategic Employment Site in the Local Plan.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	The site is suitable for a variety of employment uses.		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Unaware of any specific regeneration proposals		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A		

Strategic Planning and Access	The site contributes to meeting employment floor space targets set out in PUSH
Recommendation	Site score: D – below average Whilst the accommodation is dated, this estate plays an important role within the local economy.

Site Name: Budds Lane Industrial Estate			
Site Ref:	TV11		
Borough:	Test Valley Borough Council	Size (ha)	8.3
Market Segment:			
Description of Site and Location:	Budds Lane is a well established industrial estate on the northern edge of Romsey. The site is situated to the north of Romsey town centre and J3 of the M27 motorway.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	There are a number of dated industrial/warehouse units built from the 1960s onwards. Most recent development of small business units, known as Fernacre Business Park, at the rear of the site, occurred in circa 2000.		
Adjacent land use and conflicts	To the east there is a railway line and to the west is the River Test. To the south is residential.		
Known constraints and infrastructure requirements	Part of the site has been prone to flooding in the past. The site has restrictive access under a railway bridge, which has height and width restrictions (3.9m).		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			A Strategic Employment land allocation in the Local Plan.
2.2: Is the site identified or likely to be required for a specific user or specialist use?			The site is suitable for a range of employment uses.
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Unaware of long term development/regeneration proposals.
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A

Strategic Planning and Access	The site contributes to meeting employment floor space targets set out in PUSH
Recommendation	Site score: D – below average This estate plays an important role within the local economy and should therefore be managed as an employment estate.

Site Name: Whitenap			
Site Ref:	TV12		
Borough:	Test Valley Borough Council	Size (ha)	6.0
Description of Site and Location:	The south site is situated at the junction of the A3057 and A27, with the established Abbey Park Industrial Estate located to the east and J3 of the M27 motorway to the south.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			No
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Not known
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Not known
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			See 2.4
1.7: Is the site immediately available?			Not known
Market Appraisal	It can be considered the subject site is on one of the main approach roads to Romsey town centre and as such, could suit a variety of employment related uses, including offices, industrial, showroom and trade counter.		
Adjacent land use and conflicts	None, as far as we are aware.		
Known constraints and infrastructure requirements	We are not aware of any constraints, however, there will be infrastructure requirements to make this a viable site.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			A proposed employment allocation in the Local Plan
2.2: Is the site identified or likely to be required for a specific user or specialist use?			B1 (18,000 sq m) and B2 (6,000 sq m) uses proposed for the site under Policy LE3 in the Local Plan.

<p>2.3: Is the site part of a comprehensive or long term development or regeneration proposal?</p>	<p>A strategic land allocation identified in the Local Plan to meet future employment requirements. Proposed phasing; Medium term.</p>
<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>The Local Plan identifies a requirement for a new access to the development. It is unclear if public funding is set aside to overcome infrastructure requirements. It is envisaged that public funding could take the form of site specific s106 contributions or CIL in relation to development proposals for the site.</p>
<p>Strategic Planning and Access</p>	<p>Designated strategic employment land which currently contributes to the employment floor space targets set out in PUSH.</p>
<p>Recommendation</p>	<p>Site score: E – low</p> <p>We would recommend that this site is proactively managed in line with our market appraisal above.</p>

Site Name: University of Southampton Science Park			
Site Ref:	TV13		
Borough:	Test Valley Borough Council	Size (ha)	18.6
Description of Site and Location:	Southampton Science Park is located 1 mile from the M3 J14 and is located close to the M27 on the Northern edge of Southampton. It provides high quality offices and laboratory space.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		Yes	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Yes	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Yes	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		Yes	
Market Appraisal	<p>The University of Southampton Science Park is one of the strongest employment sites within the Borough and significant investment in infrastructure has already been made on the site, including high speed connectivity. It has good road links with the M3/M27 motorways being within a short distance to the south and west of the site. There is excellent on-site parking and amenities, including hotel, gym, coffee shop and sits in a high quality semi-rural environment.</p> <p>At the rear of the site, a new development of a 30,000 sq ft office building has been speculatively built to meet demand.</p> <p>The site comprises a mixture of office and lab space, catering to the science and technology sector with the size of space ranging from incubator through to larger units. The science and technology sector continues to be a strong growth sector within the market.</p> <p>A phased program of refurbishment is ongoing.</p>		
Adjacent land use and conflicts	An additional 1.5 hectares of development land is potentially available to the south of the site.		
Known constraints and infrastructure requirements	Due to the site's location, accessibility for public transport links is limited.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		A proposed employment allocation in the Local Plan	

2.2: Is the site identified or likely to be required for a specific user or specialist use?	A proposed allocation of 6,000 sq m of B1 floor space
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Policy LE1 identifies scope for future development of part of site to provide support facilities to the Science Park.
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No specific infrastructure or on site constraints identified.
Strategic Planning and Access	A proposed future land allocation identified in the Local Plan which currently contributes to the employment floor space targets set out in PUSH.
Recommendation	<p>Site score: B – above average</p> <p>Owing to the site's quality, demand for employment uses is high and as such should be retained.</p>

Site Name: Test Valley Business Park			
Site Ref:	TV14		
Borough:	Test Valley Borough Council	Size (ha)	8.2
Description of Site and Location:	The site is situated between Chandlers Ford and Romsey. To the north of the M27 motorway and west of the M3. Nearest motorway junction is J3 of the M27 and J13 of the M3		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Not known
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Not known
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Not known
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	We are aware, historically, that the site has been marketed for employment related use in the late 80s/90s and part of the site has been developed by Draper Tools for its own use.		
Adjacent land use and conflicts	Residential to the west boundary.		
Known constraints and infrastructure requirements	Should the site come forward in the future, consideration would need to be given towards infrastructure requirements.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			A designated Strategic Employment Site in the Local Plan.
2.2: Is the site identified or likely to be required for a specific user or specialist use?			The site is in close proximity to the road network and is suitable for a variety of employment uses, in particular warehousing and distribution
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Unaware of any specific proposals to regenerate the site
2.4: Is there public funding committed (or likely to be provided) sufficient to			It is unclear if public

<p>overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>funding has been set aside to meet any site constraints. Site constraints unknown.</p>
<p>Strategic Planning and Access</p>	<p>The site contributes to meeting employment floor space targets set out in PUSH.</p>
<p>Recommendation</p>	<p>Site score: D – below average</p> <p>Should the site come forward in the future, we would recommend that it is proactively managed for employment related uses.</p>

Site Name: Adanac Park			
Site Ref:	TV15		
Borough:	Test Valley Borough Council	Size (ha)	33.5
Description of Site and Location:	Adanac Park is located next to the M271 Junction 3 interchange at Nursling on the Western border of Southampton.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	N/A		
1.7: Is the site immediately available?	Yes		
Market Appraisal	Site has been identified as an employment site in the Local Plan. An office building occupied by Ordnance Survey in 2011, and hotel has been delivered to date.		
Adjacent land use and conflicts	The site lies adjacent to the east of the M271, between the Nursling Estate and the residential areas of Nursling and Lordshill. The new Lidl regional distribution centre is to the south (site TV18).		
Known constraints and infrastructure requirements	None		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	A designated strategic employment site in the Local Plan.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	A proposed employment allocation in the short-term, B1 office use identified. Under Policy LE6, the following uses are promoted office/research/manufacturing Class B1.		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	A strategic employment		

	allocation identified in the Local Plan to meet future employment floor space requirements.
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Unaware of any infrastructure/on site constraints
Strategic Planning and Access	A strategic employment allocation identified in the Local Plan that contributes a significant quantum of employment floor space. The site benefits from an extant planning permission up to 75,000 sq m of employment floor space for Class B1 use (i.e. offices, research & development and manufacturing). With the exception of the Ordnance Survey headquarters, the site remains undeveloped with the owners stating that the permission for large scale users has failed to attract developer interest. The large scale user restriction has been removed from the permission by the council which will assist with stimulating interest in the site.
Recommendation	Site score: B – above average Site is considered to be suitable for further employment development, the type of which should be determined by market demand.

Site Name: Nursling Estate			
Site Ref:	TV16		
Borough:	Test Valley Borough Council	Size (ha)	71.3
Description of Site and Location:	Nursling Estate is one of the principal distribution locations on the South Coast, adjacent to J3 of the M27 motorway and to the north of Southampton dock gate 20. Access to the site is via Junction 1 of the M271.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	In multi-ownership		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	No		
Market Appraisal	<p>Nursling Estate is one of the principal distribution locations on the South Coast, adjacent to J3 of the M27 motorway.</p> <p>The majority of units were built in the 1970s/80s with selective developments taking place in the 1990s/2000s. Units are generally owned by institutional funds, such as CBRE Global Investors, Aviva and Standard Life. Older style units are typically refurbished on a case by case basis, as they come back onto the market.</p>		
Adjacent land use and conflicts	Not aware of any		
Known constraints and infrastructure requirements	None, as far as we are aware.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	A designated strategic employment site in the Local Plan.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	Policy LE7 specifies that the Estate's primary function is B8 use (storage and distribution).		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Unaware of any specific proposals to regenerate the site.		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known		

Strategic Planning and Access	<p>The site has good access to the strategic road network.</p> <p>A strategic employment allocation in the Local Plan which currently contributes to the employment floor space targets set out in PUSH.</p>
Recommendation	<p>Site score: B – above average</p> <p>Given the strategic importance of this site, we would recommend that it is managed for employment related uses.</p>

Site Name: Hampshire Corporate Park			
Site Ref:	TV17		
Borough:	Test Valley Borough Council	Size (ha)	11.6
Description of Site and Location:	Hampshire Corporate Park is a prominent office campus to the South of Chandlers Ford. It is conveniently located close to the M3/M27 road network. The site is in Chandlers Ford (mainly within EBC).		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			Yes
Market Appraisal	<p>The site as defined is predominantly office buildings with a small section of the site currently in use a by a builder's merchants. Hampshire Corporate Park was built in the late 1980s/early 1990s and Hutwood Court, located at the southern end of the site, was built in circa 2004. The size of properties available range from approximately 10,000 sq ft up to 90,000 sq ft.</p> <p>The site is well located in terms of of road infrastructure being at the confluence of the M3/M27 motorways. It is situated on a main bus route and approximately 2.7 miles from Southampton Airport Parkway railway station.</p> <p>There is reasonable access to amenities, with a hypermarket adjacent to the site and local retail facilities at Chandlers Ford.</p>		
Adjacent land use and conflicts	To the north lies a mix of residential and employment use, which is another office building; to the east lies the hypermarket; to the south is woodland and to the west is farmland.		
Known constraints and infrastructure requirements	None as far as we are aware.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			A designated cross boundary strategic employment site

2.2: Is the site identified or likely to be required for a specific user or specialist use?	The site has good access to the strategic road network. Employment uses in particular storage and distribution.
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Unaware of any regeneration proposals for the site
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known
Strategic Planning and Access	A strategic employment allocation identified in the Local Plan which currently contributes to the employment floor space targets set out in PUSH.
Recommendation	<p>Site score: B – above average</p> <p>The site's overall quality means that demand from employment occupiers will be strong and therefore, the site should be retained for employment uses.</p>

Site Name: South of Brownhill Way			
Site Ref:	TV18		
Borough:	Test Valley Borough Council	Size (ha)	10.4
Description of Site and Location:	The site South of Brownhill Way is located in Nursling/Southampton (split between TVBC and SCC), and lies adjacent to J1 of the M271, to the south of J3 of the M27 motorway.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Not known
1.2: Has there been any recent development activity, within the last 5 years?			Yes
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Not known
1.7: Is the site immediately available?			Being developed
Market Appraisal	The site is currently being developed by Lidl for their own 460,000 sq ft regional distribution facility. Construction is due to complete in Q3 2016.		
Adjacent land use and conflicts	M271 motorway to the west.		
Known constraints and infrastructure requirements	Improvements are currently being made as part of the development to the local road network.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			An allocated strategic employment site.
2.2: Is the site identified or likely to be required for a specific user or specialist use?			
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			Policy LE4 identifies the following infrastructure requirements: new vehicular access and pedestrian and cycle access to Brownhill Way. Public funding in the

	<p>form of S106 agreement has been secured towards highways infrastructure improvements including; dualling of Brownhill Way and Brownhill Way crossing and pedestrian/cycle-way to Lower Brownhill Road.</p>
<p>Strategic Planning and Access</p>	<p>Improvements to local road infrastructure is identified in the local plan and contributions towards these improvements have been in part secured via section 106 agreement and the Government's Pinch Point Programme (PPP).</p> <p>The site is a strategic employment allocation identified in the Local Plan and currently contributes to the employment floor space targets set out in PUSH.</p>
<p>Recommendation</p>	<p>Site score: A – high</p> <p>As this site has now been developed for employment related uses it should remain as this.</p>

Site Name: Belbins Business Park			
Site Ref:	TV19		
Borough:	Test Valley Borough Council	Size (ha)	4.9
Description of Site and Location:	Belbins Business Park is located on the edge of Romsey close to the Junction of Cupernham Lane and Sandy Lane. It comprises industrial and business units.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	Yes		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	No		
Market Appraisal	The site is situated in a rural location with access via 'B' roads and remote from the motorway network. Development of the front part of the site has taken place in the late 80s/90s for employment related business units on a smaller scale suited to serve the local economy. A small scheme of six business units was developed at the rear of the site within the last five years and which are now all believed to be occupied.		
Adjacent land use and conflicts	The site is a mixture of residential, open storage and wooded areas.		
Known constraints and infrastructure requirements	Road network not currently conducive to larger scale development.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	A designated Strategic Employment Site in the Local Plan.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?			
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Unaware of any proposals		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known		

Strategic Planning and Access	The site contributes to meeting employment floor space targets set out in PUSH.
Recommendation	Site score: D – below average The site plays an important role within the local economy and would therefore recommend that the site continues to be managed for employment related uses.

Site Name: Wynford Industrial Park, Belbins			
Site Ref:	TV20		
Borough:	Test Valley Borough Council	Size (ha)	2.1
Description of Site and Location:	Wynford Industrial Park provides industrial / warehouse units in a rural location north of Romsey town centre.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	No		
Market Appraisal	The site is situated in a rural location with access via 'B' roads and remote from the motorway network. It comprises an established estate of smaller sized business units, suited to a more rural local economy. At the back of the site, covering approximately half of the total site area, is land used for open-storage, the majority of which is occupied by a scrap metal merchants specialising in MOT failures and insurance write-offs. Owing to the nature of some of the occupiers there is the potential for contamination at the site.		
Adjacent land use and conflicts	Agricultural land surrounds the majority of the site, with a waste recycling facility bordering the western boundary.		
Known constraints and infrastructure requirements	Road network not currently conducive to larger scale development. Potential contamination issues on the area occupied by the scrap metal merchant.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	A designated Strategic Employment Site in the Local Plan.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?			
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Unaware of any specific proposals		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Unaware of any constraints		

Strategic Planning and Access	The site contributes to meeting employment floor space targets set out in PUSH.
Recommendation	Site score: E – low The site plays an important role within the local economy and would therefore recommend that the developed site is managed and the undeveloped area is proactively managed for employment related uses.

Site Name: Yokesford Hill Industrial Estate, Belbins			
Site Ref:	TV21		
Borough:	Test Valley Borough Council	Size (ha)	2.5
Description of Site and Location:	Yokesford Hill Industrial Estate is located North of Romsey town centre in a rural location providing industrial units with yard space.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Not known	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Not known	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		No	
Market Appraisal	<p>The site is situated in a rural location with access via 'B' roads and remote from the motorway network. It comprises a small number of larger industrial/warehouse buildings, part of which are occupied by a waste and recycling user. Beyond the northern boundary of the site, the existing occupier has extended its business and where a significant volume of materials for recycling are stored.</p> <p>We are advised that 90% of waste brought to site is recycled. Nevertheless, there is the potential, given the nature of the business, for contamination.</p>		
Adjacent land use and conflicts	Stock piles of recycling materials to the north east; to the east is Wynford Industrial Estate, including a number of B1, B2 and B8 occupiers, and to the south and west is agricultural land and woodland. There is a collection of residential properties that reside on the south side of Belbins/Yokesford Hill.		
Known constraints and infrastructure requirements	Road network not currently conducive to larger scale development. There could be potential for contamination, with the consequential cost of remediation.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		A designated Strategic Employment Site in the Local Plan.	
2.2: Is the site identified or likely to be required for a specific user or specialist use?			
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		Unaware of any specific proposals	
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?		Not aware of any constraints/Not applicable	

Strategic Planning and Access	The site contributes to meeting employment floor space targets set out in PUSH.
Recommendation	Site score: E – low The site provides a useful facility for the area. We recommend that the site is managed for employment related uses, however, were it to be redeveloped, it would not be suitable for larger scale B8 occupiers but could provide a site suitable for small business units.

Site Name: University of Southampton Science Park Extension			
Site Ref:	TV22		
Borough:	Test Valley Borough Council	Size (ha)	1.5
Description of Site and Location:	Southampton Science Park is located 1 mile from the M3 J14 and is located close to the M27 on the Northern edge of Southampton. It provides high quality offices and laboratory space.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	Yes		
Market Appraisal	<p>The University of Southampton Science Park (TV13) is one of the strongest employment sites within the Borough and significant investment in infrastructure has already been made on the developed part of the Park, including high speed connectivity, on-site amenities such as hotel, gym, coffee shop and excellent on-site parking. It has good road links with the M3/M27 motorways being within a short distance to the south and west of the site.</p> <p>The extension site provides further opportunity to meet market demand. The site benefits from all of the existing Science Park infrastructure and amenities and would meet the needs of future demand from the science and technology sector.</p>		
Adjacent land use and conflicts	M27 motorway to the south, Science Park to the north east (TV13); residential property to the west along with a large area of woodland.		
Known constraints and infrastructure requirements	None, so far as we are aware.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			
2.2: Is the site identified or likely to be required for a specific user or specialist use?	Research and Development (B2 Use Class) site is extension of an existing R & D Park		

<p>2.3: Is the site part of a comprehensive or long term development or regeneration proposal?</p>	<p>This site forms part of the long term proposal for development of the University Park.</p>
<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>It is unclear whether there is public funding set aside or whether the plans will be resourced from private investment.</p>
<p>Strategic Planning and Access</p>	
<p>Recommendation</p>	<p>Site score: C – average</p> <p>We would recommend that the site is brought forward for development to meet future demands of the Science Park once the Benham Campus development has been completed.</p>

Site Name: Bargain Farm			
Site Ref:	TV23		
Borough:	Test Valley Borough Council	Size (ha)	2.0
Description of Site and Location:	The site lies adjacent to J1 of the M271, to the south of J3 of the M27 motorway.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		No	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Yes	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Yes	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		Yes	
Market Appraisal	<p>To the southwest of the site is a new 460,000 sq ft distribution development (TV18), which Lidl are currently building for its own occupation. Construction of which should complete in Q3 2016.</p> <p>There is outline planning permission for B1 office, research and light industry development and B2 general industrial uses for up to 139,295 sq ft. This applies to the western part of the site.</p>		
Adjacent land use and conflicts	The site is adjacent to the Adanac Park development (TV15), which has the potential to provide 75 acres of development land, adjacent to Ordnance Survey's headquarters. There is a hotel to the west and agricultural land to the east. However, further east lies the David Lloyd leisure complex.		
Known constraints and infrastructure requirements	None, as far as we are aware.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		The Local Plan allocates the site for employment use	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		A strategic employment allocation specifies B1 and B2 use (2ha) and 3ha for a park and ride facility	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		The Local Plan allocates the site for future employment use.	

<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>It is unknown whether there is public funding committed.</p>
<p>Strategic Planning and Access</p>	<p>An agricultural site with excellent access to the strategic road network. The employment allocation forms part of the strategic requirement for South Hampshire and PUSH.</p>
<p>Recommendation</p>	<p>Site score: B – above average</p> <p>Given the location and the surrounding employment developments, we would expect this site to be brought forward for development in the foreseeable future, to include mixed-use employment related development, such as trade counter, showroom, B1 and B8 uses.</p>

Site Name: Weyhill Business Park			
Site Ref:	TV24		
Borough:	Test Valley Borough Council	Size (ha)	5.0
Market Segment:			
Description of Site and Location:	The site lies west of Andover and the Portway Industrial Estate.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Not known
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Not known
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Not known
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Not known
1.7: Is the site immediately available?			No
Market Appraisal	It is located in a rural location with limited access to the A303, via a 'B' road which passes residential, a care home and Mayfield Avenue Industrial Estate. The site comprises two, older style large industrial/warehouse units suited to medium/larger business types.		
Adjacent land use and conflicts	Industrial estate to the west; residential to the east and southeast; and farmland to the north and south.		
Known constraints and infrastructure requirements	Limited access via residential properties and a care home.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			The Local Plan allocates the site for employment use.
2.2: Is the site identified or likely to be required for a specific user or specialist use?			
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Unknown
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			It is unknown whether there is public funding committed.

Strategic Planning and Access	A rural location with reasonably good access to the road network, along country lanes.
Recommendation	Site score: D – below average We would recommend that the site is retained for employment uses.

Site Name: Dean Hill Park			
Site Ref:	TV25		
Borough:	Test Valley Borough Council	Size (ha)	8.5
Description of Site and Location:	Dean Hill Park is a rural site located in East Dean off East Dean Road.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Not known	
1.2: Has there been any recent development activity, within the last 5 years?		Not known	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Yes	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		No	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		No	
1.7: Is the site immediately available?		No	
Market Appraisal	<p>A former MoD site, now owned by a commercial property developer specialising in rural sites. It comprises a collection of office and industrial buildings, together with bunkers, arranged in a linear configuration, along a single estate road.</p> <p>Buildings are in the region of 80 years' old, which are subject to a refurbishment programme to support occupation.</p> <p>In terms of location, the site is particularly rural with access via 'B' roads, although Dean railway station is located nearby. The nearest major arterial road is the A36, to the west, providing access into Salisbury.</p> <p>The letting agents have described the site as having reasonable good demand, perhaps given its unusual unique characteristics.</p>		
Adjacent land use and conflicts	The site extends to over 385 acres of parkland, fields and conservation areas, including 120 acres of Yew woodland, chalk grassland and juniper scrub, which has been designated a Site of Special Scientific Interest.		
Known constraints and infrastructure requirements	Part of the site has been designated as a Site of Special Scientific Interest (SSSI).		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		The Local Plan designates the site for employment use.	

2.2: Is the site identified or likely to be required for a specific user or specialist use?	Light industrial uses would be best suited in this location, given that part of the site is SSSI.
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Unknown
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	It is unknown whether there is public funding committed.
Strategic Planning and Access	A rural location with relatively good access to the road network, along country lanes.
Recommendation	<p>Site score: E – low</p> <p>Continued asset management opportunities and to be retained for employment related uses.</p>

Site Name: Harewood Forest Industrial Estate			
Site Ref:	TV26		
Borough:	Test Valley Borough Council	Size (ha)	2.9
Description of Site and Location:	Harewood Forest Industrial Estate is located in Longparish with direct access off the A303 trunk road.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	Not known		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Not known		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Not known		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Not known		
1.7: Is the site immediately available?	Not known		
Market Appraisal	The site well located adjacent to the A303, to the east of Andover and west of the A34. The premises appear to be older style industrial buildings, which suit the rural location.		
Adjacent land use and conflicts	Woodlands and A303 dual carriageway		
Known constraints and infrastructure requirements	None known.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	A designated strategic employment site in the Local Plan		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	Distribution and warehousing, owing to the site's close proximity to the strategic road network.		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Not known		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known		

Strategic Planning and Access	A rural location, with relatively good access to the road network.
Recommendation	Site score: D – below average Whilst the site has good access to the A303, it is in a rural location which would limit the potential for re-development on this site. Should the site come forward for re-development then alternative uses, such as residential could be considered. It could however, have a place in the market for those local, un-neighbourly businesses that benefit from being situated in a more remote location.

Site Name: Weyhill Fairground			
Site Ref:	TV27		
Borough:	Test Valley Borough Council	Size (ha)	2.8
Market Segment:			
Description of Site and Location:	The site lies to west of Andover and the Portway Industrial Estate.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Not known
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	Whilst the site is in a more rural location, it has good road communications to the A303 and comprises modern industrial/business units in a range of sizes to suit small to medium business.		
Adjacent land use and conflicts			
Known constraints and infrastructure requirements	None that we are aware of.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Allocated employment site.
2.2: Is the site identified or likely to be required for a specific user or specialist use?			General employment uses
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Unknown
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			Unknown whether public funding is committed.
Strategic Planning and Access	A rural location with relatively good access to the road network.		

Recommendation	Site score: B – above average We would recommend that the site is managed for employment related uses.
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Site Name: Mayfield Avenue Industrial Estate			
Site Ref:	TV28		
Borough:	Test Valley Borough Council	Size (ha)	4.6
Description of Site and Location:	The site lies west of Andover and the Portway Industrial Estate.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Not known		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Not known		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Not known		
1.7: Is the site immediately available?	No		
Market Appraisal	It is located in a rural location with limited access to the A303, via a 'B' road which passes residential, a care home and Weyhill Business Park. The site comprises mainly 1970s larger industrial/warehouse units suited to medium/larger business types. There is a development at the rear of the site, which looks to have been constructed in the 1990's that comprises circa 14 smaller industrial/warehouse units.		
Adjacent land use and conflicts	Industrial estate to the east; farmland to the north, south and southwest; and a small amount of residential to the west.		
Known constraints and infrastructure requirements	Limited access via residential properties and a care home.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	A designated strategic employment site.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	Warehouse and distribution, given the site's good access to the road network.		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Not known		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known		

Strategic Planning and Access	A rural location with relatively good access to the road network.
Recommendation	Site score: D – below average We would recommend that the site is managed for employment uses, however, should an opportunity arise in the future, consideration should be given to alternative uses.