



**Lambert
Smith
Hampton**

www.lsh.co.uk

Employment Land Study

covering

Southampton

on behalf of

**Southampton City Council and Eastleigh
Borough Council**

Document author:

Graham Holland
Lambert Smith Hampton
5 Town Quay
Southampton
SO14 2AQ

Tel: +44 (0)23 8033 0041
Fax: +44 (0)23 8033 0060

Date: June 2017
Ref: GRH/AG/nb

CONTENTS

1.0 Executive Summary 2

 1.1 Southampton City site reviews 2

2.0 Introduction 4

 2.1 Purpose of the report 4

 2.2 LSH Credentials and methodology 5

3.0 Hampshire Market Overview 8

 3.1 General 8

 3.2 Industrial market overview 8

 3.3 Office market overview 12

 3.4 Maritime industry 15

 3.5 Rural industry 18

4.0 Southampton CITY Overview 21

 4.1 Location 21

 4.2 Industrial take-up and availability 22

 4.3 Key industrial estates within the Borough 22

 4.4 Key industrial transactions 23

 4.5 Office take-up and availability 24

 4.6 Key office locations 25

 4.7 Key office transactions 26

 4.8 Summary of Southampton City site reviews 26

5.0 Glossary of Terms 30

Appendices

Appendix 1 Site scores and assessment criteria

Appendix 2 Southampton City site proformas

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 or that they are economically unviable.

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 Southampton City site reviews

Reference	Site name/address	Grade A E	Quality
4	Ford (including Airways Distribution Centre)	A	High
5	Test Lane South	A	
24	North of Parks	A	
25	North of Station	A	
1	Millbrook Road industrial areas, including NXP site	B	Above average
2	South of West Quay Road industrial areas	B	
19	City Commerce area	B	
21	Test Lane North	B	
26	Carlton Crescent	B	
30	Centenary Quay Marine employment	B	
12	Central Trading Estate	C	Average
13	Centurian site	C	

Reference	Site name/address	Grade A E	Quality
16	Portswood Road	C	
20	REI10 xvi south of Itchen Bridge/Floating Bridge Road	C	
22	Redbridge Causeway garage REI11 viii	C	
3	Empress Road area	D	Below average
6	Northam Triangle area	D	
9	South of Costco	D	
14	West of Meridian	D	
15	Quayside Road	D	
17	Ashley Crescent	D	
18	Meridian	D	
23	BAT remainder	D	
28	Drivers Wharf area	D	
29	Northam peninsula area	D	
27	Willments/Hazel Road area	D	
7	Oakley Road	E	Low
8	Northbrook Industrial site	E	
10	Pitt Road/Liners	E	
11	Millbrook Road East	E	

Table 1 - Summary of Southampton City land study, including scoring assessment

- 1.1.1 Southampton is the major regional centre for central southern England. This status has attracted many national and international businesses to locate in or around the city. It benefits from excellent road and rail links, the Port and the airport and ferry links with the Isle of Wight.
- 1.1.2 A number of the sites in 'E' (Low) categories are lacking in prominence and profile and some are close or adjacent to, residential areas and may be sensitive to complaints of noise, disruption or 24-hour operation. It may be appropriate for some of these sites to be considered for alternative uses.
- 1.1.3 Future warehousing and logistics development sites in Southampton are focussed around communications hubs at Test Lane South (16 acres) and the former Ford site (25 acres), both of which are due to commence construction in 2016/17. These developments offer prime opportunities to deliver new warehousing and logistics stock to meet the burgeoning demands and have therefore been graded as 'A' (High).
- 1.1.4 The reducing supply of employment space in the City and the loss of a number of sites to other uses, particularly residential and student accommodation, means that existing or potential employment sites should be protected until the market conditions are ripe for development to take place.

2.0 INTRODUCTION

2.1 Purpose of the report

2.1.1 Lambert Smith Hampton (LSH) has been commissioned by Southampton City Council and Eastleigh Borough Council (EBC), 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 future commercial 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.

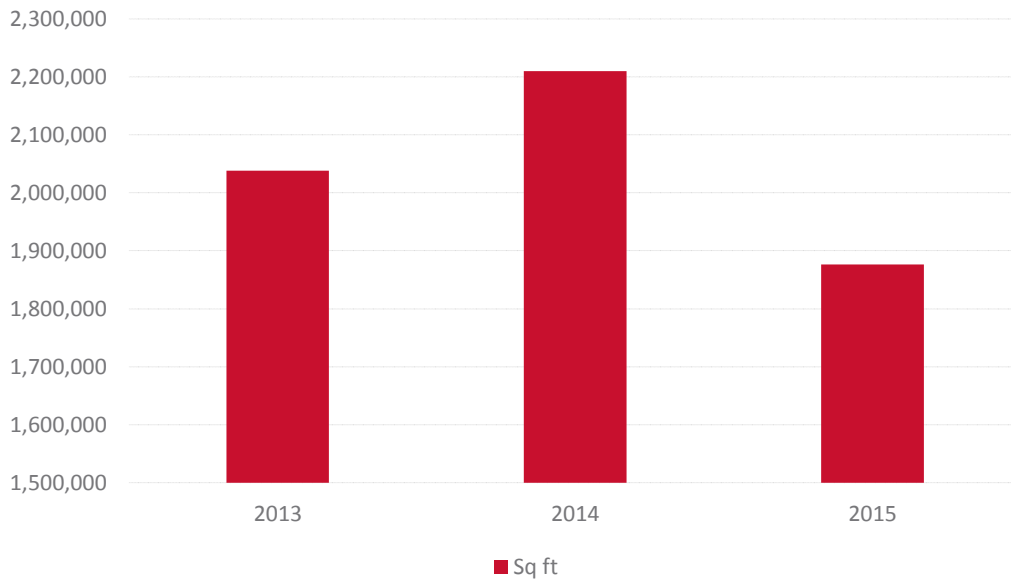


Figure 1 - Total sq ft transacted by LSH's South Coast agency division 2013 to 2015 (Source: LSH)

- 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 enables 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) 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 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.
- 3.1.4 There are prime locations along the M27 Corridor where new-build office schemes are on the horizon, and these include Lakeside, North Harbour, Portsmouth in the east, Station Quarter in Southampton 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 in terms of reducing the number of available sites.

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.

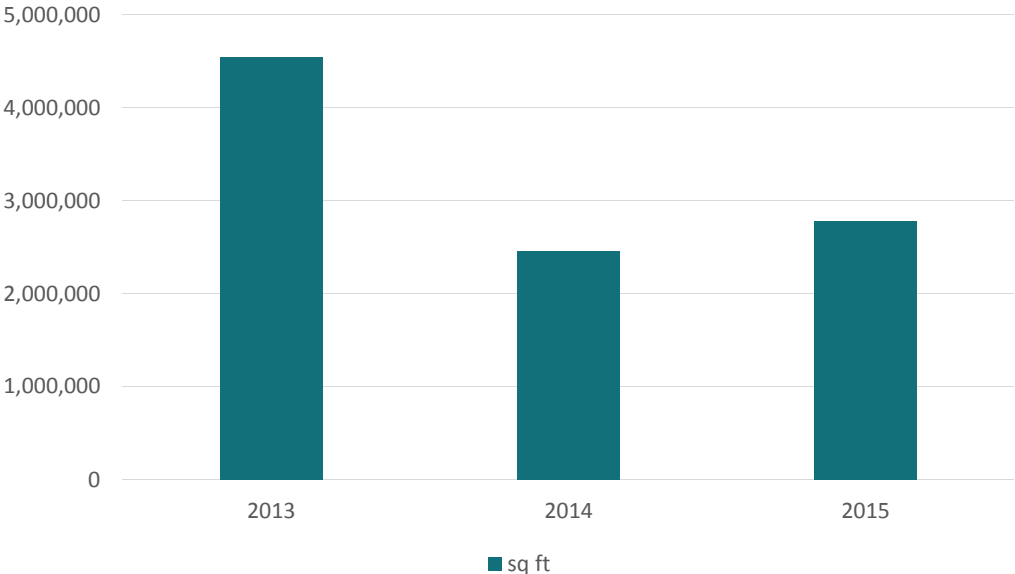


Figure 2 – South Hampshire and Andover industrial availability for the period 2013 to 2015 (Source: LSH and CoStar)

3.2.5.2 From October 2017, there has been 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. Circumstances and activity were also affected by the lead up to and outcome of the Brexit vote. 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.

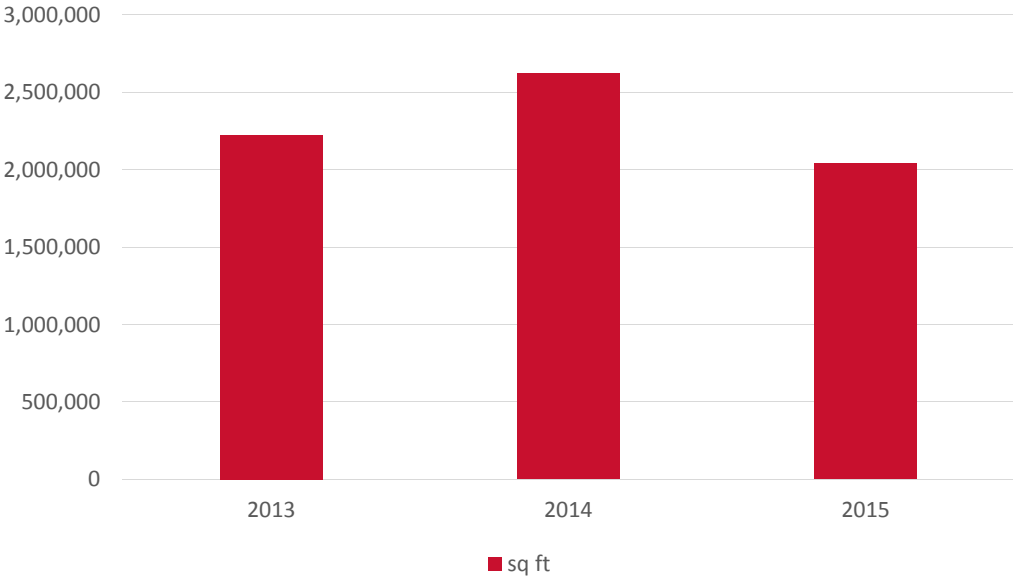


Figure 3 – South Hampshire and Andover industrial take-up for the period 2013 to 2015 (Source: LSH and CoStar)

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 southern part of the County is encouraging with demand beginning to outstrip 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.

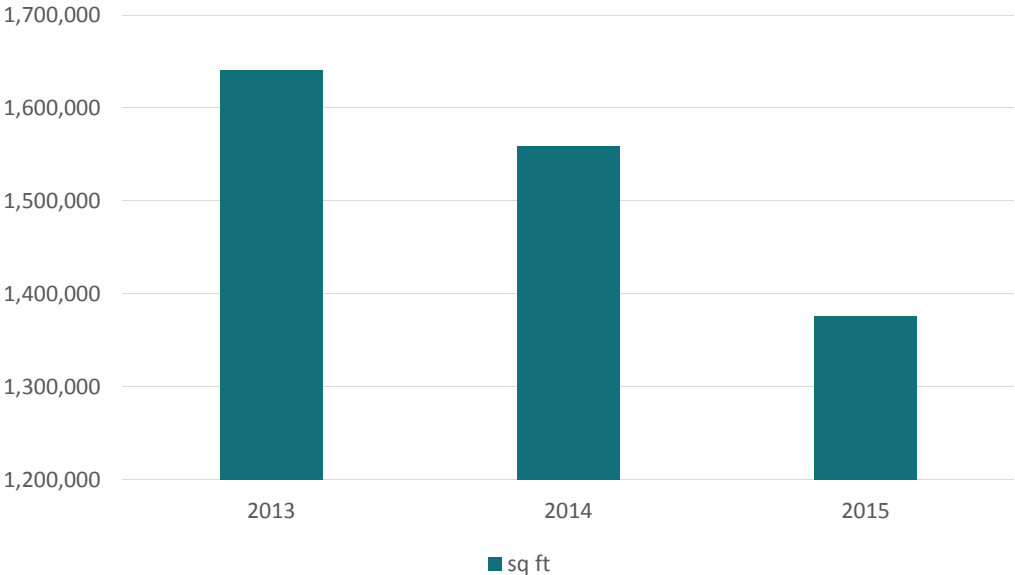


Figure 4 – South Hampshire and Andover office availability for the period 2013 to 2015 (Source: LSH and CoStar)

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.

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

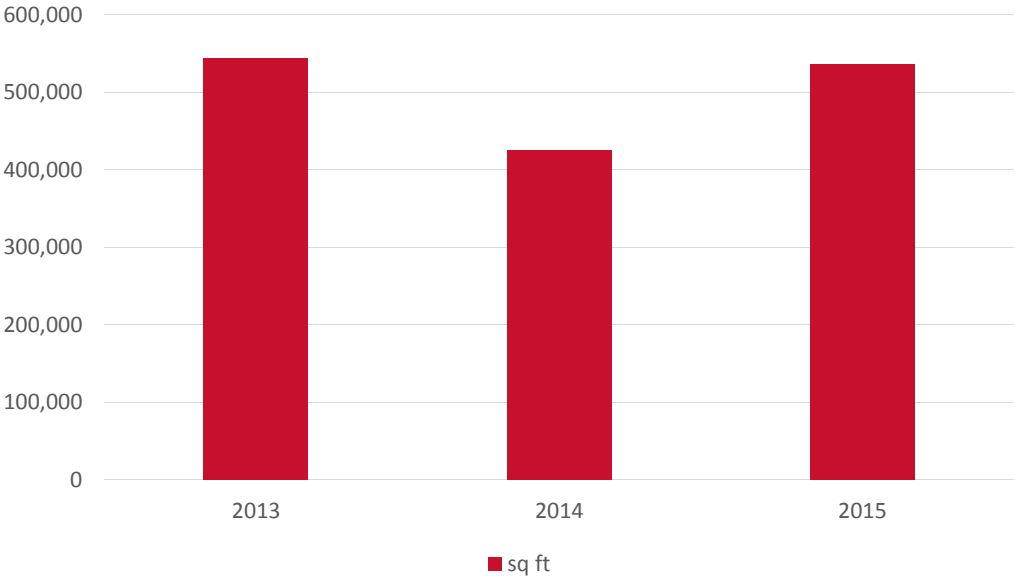


Figure 5 – South Hampshire and Andover office take-up for the period 2013 to 2015 (Source: LSH and CoStar)

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 more agile 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 constraints on the opportunities for the relocation of businesses, prompting occupiers to consider renewal of leases within their current buildings. Current global economic and political 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 also 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 Over the last twenty to thirty years, there have been gaps between businesses in the marine industries in Southampton in terms of size and scale. Some businesses have a requirement for good water access, with deep water moorings and an established quay, whilst others, which may be likened to cottage industries occupy small, cheap buildings and see direct water access as a bonus, 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 Small Medium Enterprises (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 Maritime 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 and the Centenary Quay marine quarter should be protected and promoted.

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, e.g. rural sites and associated uses and 'unneighbourly/ messy' uses which are appropriately priced.

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 SOUTHAMPTON CITY OVERVIEW

4.1 Location

4.1.1 The City of Southampton, often referred to as The Gateway to the World, is in the southern region of Hampshire, bound by the Boroughs of Test Valley and Eastleigh to the north and Southampton Water and the River Test to the south. Furthermore, the River Itchen separates the east and west parts of the city.



4.1.2 The City of Southampton has a population of 249,500 (2015 Mid Year Estimate). The age structure has approximately 13% 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 43.8% 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 38.3% of the workforce. Full-time students make up 17.8%. These statistics compare with the national average of 53.5%, 37.5% and 9% respectively.

4.1.3 The City of Southampton has good transport links with the rest of the county and further afield. The City is bounded by two motorways to the north – the M27 and M3 – and has eight railway stations, including the mainline station in the city centre which provides routes to Portsmouth, Weymouth, the Midlands and London. The rail network is also used for freight services to and from the docks. In addition, there are ferry services linking the City of Southampton with the Isle of Wight and Hythe.

4.1.4 The Port of Southampton provides passenger and cargo services. It is Europe's leading turnaround cruise port and the UK's most productive container port. Each year the port handles approximately 14 million tonnes of commodities including 840,000 vehicles and welcomes approximately 1.7 million cruise passengers.

4.1.5 The City is also home to two universities with a student population of around 40,000, which has a positive effect on the dynamics of the city in many ways.

4.2 Industrial take-up and availability

4.2.1 There is a limited amount of industrial space within the city boundaries and outside of the Port of Southampton. Since 2013 availability has reduced by just under 60% primarily due to one or two key transactions at Endeavour Park, Millbrook, which included 95,000 sq ft to UPS and 40,000 sq ft to Selco. In 2015 supply and take-up were in equilibrium at circa 250,000 sq ft, thus providing in the order of twelve months’ supply, which, again, is below the regional average. The potential for new employment-related development is concentrated on Test Lane South and the Former Ford site, which between them will have the potential to deliver over 600,000 sq ft of employment space.



Figure 6 – Three-year industrial availability and take-up statistics for Southampton City (Source: LSH)

4.3 Key industrial estates within the Borough

4.3.1 **Centurion Industrial Park, Southampton** is located on the east bank of the River Itchen, approximately one mile to the east of Southampton city centre on the A3024, Bitterne Road. Occupiers include Royal Mail (sorting office), Sulzer Dowding & Mills, CJR Propulsion, PTS and Jewson. Buildings were constructed approximately 25 years ago.

4.3.2 **City Industrial Park, Southampton** is a well-established industrial estate fronting West Quay Road (A33), adjacent to Dock Gate 10, the Leisure World complex and opposite West Quay retail village. It also encompasses the West Quay Road industrial area. It has good links with the M271, which in turn connects to the M27 motorway. The estate attracts a mixture of both local and national occupiers such as Howdens, Electric Centre, Dulux Paints, Walsall Electrical Distributors and City Electrical Factors. This modern estate was built approximately 25 years ago.

- 4.3.3 **Hazel Road and Willments Yard, Southampton** is located on the eastern bank of the River Itchen, to the east of the city centre and close to the Itchen Toll Bridge, which is one of the principal access routes in and out of the city centre. The estate offers a mix of traditional industrial and warehousing accommodation with water frontage and some wharfage facilities. As well as attracting established local businesses, start-ups and national occupiers, the location has also attracted marine and aggregate related businesses in the past.
- 4.3.4 **Millbrook, Southampton** is made up of a number of estates ranging from older, more traditional style industrial and warehousing units on Millbrook Trading Estate, through to new, modern units on Endeavour Park, Southampton Trade Park and Chancerygate Business Centre. Estates can be accessed from Second Avenue and Third Avenue, which link with Millbrook Road West and Millbrook Flyer (A35) and in turn, connect with the M271 and M27 motorways. Given its location, adjacent to Dock Gate 20, equidistant between the city centre and the M271 motorway, the area is popular with local and national occupiers including UPS, Leonardo, Cromwell Tools, Williams Shipping, Lok'n Store and Tile Giant. The Older buildings date from the mid-20th century, however, there is some modern stock less than two years old.
- 4.3.5 At Test Lane South, adjacent to the M271 motorway, there has been a resolution to grant approval to Evander Properties, subject to conditions, for a development of three B1 and B8 units of 40,000 sq ft, 50,000 sq ft and 117,000 sq ft. It is expected that construction of the scheme will commence during 2016.

4.4 Key industrial transactions

4.4.1 The table below provides details of significant industrial transactions in the City during the course of 2015:

Address	Occupier/Purchaser	Landlord/Vendor	Size (sq ft)	Tenure	Rent (per sq ft)
Baker's Wharf Northam Southampton	Elliott's Builders Merchants	Executors of the Estate of Clifford Odell	3.45 acres	FH	N/K
Units 1-4 Millbrook Trading Estate Third Avenue Southampton	Tyreshack	IPIF	18,240	LH	£6.58
Brazier Industrial Estate Millbrook	Snows Motor Group	Kier	17,185	FH	£87.87
7 William Street Southampton	The Baggery Limited	Trustees of Bees Corporation	10,104	FH	£46.00
Units V1 and V4 Willments Industrial Estate Southampton		Pressmile Limited			£4.25

Table 5 - Key industrial transactions within Southampton City during 2015

4.4.2 Another key transaction is the acquisition of the site and construction of a new regional distribution centre for Lidl, to the east of the M27, which has an approximate area of 400,000 sq ft.

4.5 Office take-up and availability

4.5.1 The majority of the current office supply is either poor quality stock or poorly located, relative to transport infrastructure and amenities, such as Nelson Gate and Dukes Keep. As a consequence, a number of significant occupiers have relocated out of the city centre, including HSBC, who vacated 93,000 sq ft at Nelson Gate and moved to Solent Business Park; KPMG, who relocated to Gateway House at Tollgate Business Park, Chandlers Ford; and Trethowans, who relocated to Botleigh Grange Office Campus. Supply has also fallen as a result of conversion to alternative uses such as residential, student accommodation and hotels.

4.5.2 The recent refurbishment of Mountbatten House has provided much needed good quality office space within the city centre. As a result of the refurbishment, there has been significant take-up within this building during Q1 2016 by NCL and Rockfire, demonstrating that demand for city centre space is evident, if good quality space, in the right location, is available.

4.5.3 Office rents are on the rise from historically low levels but are only just recovering to pre-recession levels of £21.00 per sq ft for grade A space.

4.5.4 In the long term, the long awaited Royal Pier Waterfront scheme could see the construction of over 500,000 sq ft of grade A office space, as part of a major mixed-use development and this is desperately needed to offset those developments that have been converted to alternative uses. However, it is expected that this will be a medium to long-term project of five to ten years.

4.5.5 In the meantime, there will be an opportunity for a major mixed-use redevelopment and refurbishment scheme at Nelson Gate in the Station Quarter, which meets the aspirations of the City Centre Masterplan. This site has the potential and the capacity to accommodate office, residential, hotel and student uses, with some A3 retail.

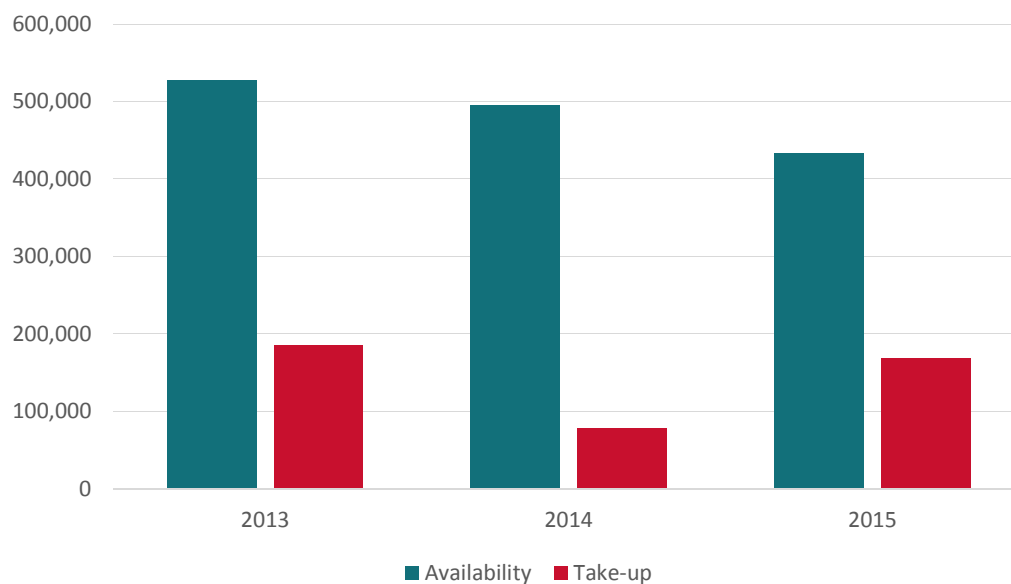


Figure 7 - Three-year office availability and take-up statistics for Southampton City (Source: LSH)

4.6 Key office locations

- 4.6.1 **North of Watts Park and East Park, Southampton** includes Cumberland Place, Charlotte Place, Grosvenor Square, Kings Park Road, Dorset Street and Carlton Crescent. It is an area which has good road communications, albeit at peak times it does suffer from congestion, and good access to public transport links, with the main bus terminal a 10-minute walk to the south and Southampton Central railway station a 12-minute walk to the south west. There is a good selection of banks, supermarket outlets, restaurants and bars within London Road and Bedford place, which is at the centre of the area. The Law Courts are situated on the northern boundary of the area and therefore, it is a popular location for law firms and barristers. The area has also attracted professional firms such as recruitment businesses, property developers, surveyors, architects and insurance companies.
- 4.6.2 **Station Quarter, Southampton** comprises a development of office accommodation to the north, east and west of the railway station, which includes Blechynden Terrace, Commercial Road and Havelock Road. However, it is a popular location given its good access to the city centre (10-minute walk to the east), public transport links and road communications. Although again, it can suffer from congestion at peak times.
- 4.6.3 The area has been allocated in the City Centre Action Plan as a VIP site and is home to large occupiers such as the Maritime and Coastguard Agency, BBC South, Old Mutual Wealth and Bond Dickinson. There has also been recent development of new offices at Charlotte Place. It also includes Nelson Gate, a large office complex of 170,000 sq ft, which is coming towards the end of its useful life in its current form. However, it has potential as a future mixed-use development to include a significant element of new office space. Coffee shops, bars,

restaurants and the Mayflower Theatre surround the immediate area of the railway station and provide much-needed amenities to occupiers. It should be noted that a number of office buildings such as Brunswick House and the former British Gas offices have gone for residential development. In addition, Orchard House and The Bond have permission for student accommodation.

4.6.4 **Town Quay, Southampton** is located at the southern tip of the city centre, next to the Red Funnel ferry terminal and accessed from Platform Road (A33), which has undergone major improvement works to the road layout recently. The development comprises a complex of five larger office buildings, as well as smaller units on The Quay itself (owned by Associated British Ports). The proposed high quality Royal Pier Waterfront regeneration development will boost the attractiveness of the area.

4.7 Key office transactions

4.7.1 The table below provides details of significant industrial transactions in the City during the course of 2015:

Address	Occupier	Landlord	Size (sq ft)	Tenure	Rent (per sq ft)
Cumberland House Southampton	Regus	Kingsbridge Estates	16,697	LH	£16.50
Charlotte Place Southampton	Berryman Lace Mawer plc	McAlear & Rushe Group	11,766	LH	£15.00
Oceana House Commercial Road Southampton	PWC	Bond Dickinson	10,000	LH	£16.50
Empress Heights Southampton	Wheatsheaf Trust	Undisclosed	6,140	LH	£12.50
Tagus House Ocean Village	Your Move	Aviva Investors Global Service	4,546	LH	£18.50

Table 6 - Key office transactions within Southampton City during 2015

4.8 Summary of Southampton City site reviews

Reference	Site name/address	Grade A E	Quality
4	Ford	A	High
5	Test Lane South	A	
24	North of Parks	A	
25	North of Station	A	
1	Millbrook Road industrial areas, including NXP site	B	Above average
2	South of West Quay Road industrial areas	B	
19	City Commerce area	B	

Reference	Site name/address	Grade A E	Quality
21	Test Lane North	B	
26	Carlton Crescent	B	
30	Centenary Quay Marine employment	B	
12	Central Trading Estate	C	Average
13	Centurian site	C	
16	Portswood Road	C	
22	Redbridge Causeway garage REI11 viii	C	
20	REI10 xvi south of Itchen Bridge/Floating Bridge Road	C	
3	Empress Road area	D	Below average
6	Northam Triangle area	D	
9	South of Costco	D	
14	West of Meridian	D	
15	Quayside Road	D	
17	Ashley Crescent	D	
18	Meridian	D	
23	BAT remainder	D	
28	Drivers Wharf area	D	
29	Northam peninsula area	D	
27	Willments/Hazel Road area	D	
7	Oakley Road	E	Low
8	Northbrook Industrial site	E	
10	Pitt Road/Liners	E	
11	Millbrook Road East	E	

Table 7 - Summary of Southampton City land study, including scoring assessment

- 4.8.1 Southampton is the major regional centre for central southern England. This status has attracted many national and international businesses to locate in or around the city. It benefits from excellent road and rail links, the Port and the airport and ferry links with the Isle of Wight.
- 4.8.2 In terms of future employment-related development within the region, the built-up, urban nature of Southampton means that many of the potential development sites will be brownfield sites, as there are very few areas of previously undeveloped land, with many of the open areas protected by planning measures to create strategic gaps. The Port of Southampton is constrained by the built-up area of the city and future growth in trade, which will benefit the city and the region, need to be considered.
- 4.8.3 Regarding the warehousing and logistics stock, sites located in the city centre tend to be centred around trade related occupiers, meeting the demands of the surrounding residential

population. These tend to be sub 10,000 sq ft, older in style, and some units are in need of refurbishment. As with the rest of the region, rental levels have steadily risen since the improvement in the economy and as supply has been constrained

- 4.8.4 The western area of Southampton, including Millbrook Road, centres around those occupiers needing to be close to the motorway network and car dealerships requiring road frontage. The most recent warehousing and logistics development in Southampton was at Endeavour Park in 2013/14, where occupiers including UPS and Selco relocated.
- 4.8.5 The Southampton city centre office market is fragmented. There are two main districts; one is focussed around the area north of Watts Park, with demand being driven by proximity to the train station and the Law Courts; the second district has developed around the waterfront, centred around Town Quay and Ocean Village. This area has proved attractive to the financial services and shipping related businesses. There is a further district within the mid-town area, at Dukes Keep and Capital House, however, demand has suffered in this area due to locality. Much of this stock has been or is the subject of, change of use to residential and student accommodation.
- 4.8.6 In the two main districts, there is currently a lack of supply to meet the improving demand. Several refurbished office schemes in the city centre will go some way towards addressing this shortfall, but this will only be a short term solution.
- 4.8.7 A number of the sites in the 'E' (Low) categories are lacking in prominence and profile, and some are close, or adjacent to, residential areas and may be sensitive to complaints of noise, disruption or 24-hour operation. It may be appropriate for some of these sites to be considered for alternative uses and, in particular, if this facilitates new development of employment space in those areas in the 'A' (High) or 'B' (Above average) categories.
- 4.8.8 Future warehousing and logistics development sites in Southampton are focussed around communications hubs at Test Lane South (16 acres) and the former Ford site (25 acres), both of which are due to commence construction in 2016/17. These developments offer prime opportunities to deliver new warehousing and logistics stock to meet the burgeoning demands and have therefore been graded as 'A' (High) within this study. Both developments will comprise unit sizes in excess of 40,000 sq ft, which will be aimed at the mid-box occupier requiring good quality, grade A space, close to the motorway network.
- 4.8.9 In May 2013 significant change in legislation, allowing Permitted Development of office space to residential, resulted in a large proportion of the office supply that no longer met market demand, being redeveloped for alternative uses. In addition, growing demand from the City's Universities for modern student accommodation has also witnessed the take-up of city centre offices for this use. This has now created a shortage of good quality office accommodation,

the net result of which is rising rents, albeit only returning to pre-recession values. Further increase is required in order to make new employment-related development viable.

- 4.8.10 The reducing supply of employment space in the City and the loss of a number of sites to other uses, particularly residential and student accommodation, means that existing or potential employment sites should be protected until the market conditions are ripe for development to take place. The loss of some existing employment floor space could be accepted if this were replaced with more suitable grade A accommodation that met the needs of the modern office occupier.
- 4.8.11 The City Centre Action Plan is focussing on meeting future demand with the creation of a new office centre south of the station, towards the waterfront, culminating in the key development at Royal Pier Waterfront. Once built, Royal Pier Waterfront could offer circa 500,000 sq ft of grade A office space, but this is unlikely to be available for a further five to ten years.
- 4.8.12 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) and start-ups (short-term flexible tenure).

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	<i>See Availability</i>
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	Layout/Prominence	Area Character	Local Amenities	Planning Status	Occupier Perception	Age/ Suitability	Redevelopment Prospects	Total score	Grade A-E
		1	2	3	4	5	6	7	8		
Southampton City											
4	Ford	5.0	5.0	5.0	4.0	5.0	4.5	4.0	5.0	37.5	A
5	Test Lane South	5.0	4.0	4.0	3.0	5.0	4.5	4.0	5.0	34.5	A
24	North of Parks	5.0	5.0	5.0	5.0	4.0	4.0	4.0	4.0	36.0	A
25	North of Station	5.0	5.0	5.0	4.0	4.0	4.0	4.0	4.0	35.0	A
1	Millbrook Road industrial areas, including NXP site	5.0	4.0	5.0	3.0	4.0	3.5	4.0	4.0	32.5	B
2	South of West Quay Road industrial areas	4.0	3.5	5.0	5.0	3.5	4.0	2.5	4.0	31.5	B
19	City Commerce area	4.0	3.0	4.0	5.0	4.0	3.0	3.0	4.0	30.0	B
21	Test Lane North	5.0	4.0	4.0	3.0	5.0	4.0	4.0	5.0	34.0	B
26	Carlton Crescent	4.0	4.0	4.0	5.0	4.0	4.0	3.0	3.0	31.0	B
30	Centenary Quay Marine employment	2.0	4.0	4.0	4.0	5.0	4.0	4.0	4.0	31.0	B
12	Central Trading Estate	4.0	3.0	3.0	4.0	4.0	3.0	1.0	3.0	25.0	C
13	Centurian site	4.0	4.0	4.0	3.0	5.0	3.5	3.0	3.0	29.5	C
16	Portswood Rd	3.0	3.0	3.0	3.0	3.0	3.0	3.0	4.0	25.0	C
20	REI10 xvi south of Itchen Bridge / Floating Bridge Rd	4.0	3.0	3.0	3.0	3.0	3.0	3.0	4.0	26.0	C
22	Redbridge Causeway garage REI11 viii	5.0	4.0	1.5	3.0	3.5	3.0	3.5	2.0	25.5	C
3	Empress Rd area	3.0	2.0	3.0	3.0	3.0	3.0	3.0	3.0	23.0	D
6	Northam Triangle area	4.0	2.5	3.0	3.0	3.0	2.5	3.0	3.5	24.5	D
9	South of Costco	4.0	2.0	3.0	3.0	3.0	2.5	1.0	1.5	20.0	D
14	West of Meridian	2.5	3.0	3.0	3.0	3.0	3.0	3.0	4.0	24.5	D
15	Quayside Rd	3.0	1.0	3.0	3.0	3.0	3.0	1.0	3.0	20.0	D
17	Ashley Crescent	3.0	2.0	3.0	3.0	3.0	3.0	2.0	3.0	22.0	D
18	Meridian	3.0	3.0	3.0	3.0	5.0	3.0	3.0	1.0	24.0	D
23	BAT remainder	3.0	3.0	2.0	3.0	3.0	2.0	3.0	3.0	22.0	D
28	Drivers Wharf area	3.0	2.0	3.0	3.0	3.0	3.0	1.0	2.0	20.0	D
8	Northbrook Industrial site	1.0	1.0	1.0	2.0	3.5	3.0	3.0	2.5	20.0	D
29	Northam peninsula area	3.0	2.0	3.0	3.0	3.0	3.0	2.0	2.0	21.0	D
27	Willments / Hazel Rd area	3.0	2.0	3.0	3.0	3.0	2.0	2.0	2.0	20.0	D
7	Oakley Rd	3.0	2.0	2.0	3.0	3.0	2.5	1.0	2.0	18.5	E
10	Pitt Rd / Liners	2.0	1.0	2.0	3.0	3.0	2.0	1.0	2.0	16.0	E
11	Millbrook Rd East	2.0	1.0	1.0	5.0	3.0	2.0	1.0	3.0	18.0	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
Southampton City Site Proformas

Site Name: Millbrook Road			
Site Ref:	REI10ii and REI9iii	LSH ref	1
Borough:	Southampton	Size (ha)	Over 10
Description of Site and Location:	<p>Industrial areas, including Endeavour Park. The site is situated adjoining the main Millbrook Road, western approach to Southampton city centre and the docks with immediate access to the M271 and J3, M27 motorway network, with the railway running through.</p>		
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 (parts)	
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>The site comprises a mixture of B1, B2 and B8 units, which range in age from the 1960s to more recent development, being Endeavour Park, which was constructed within the last 5 years. Buildings also range in size to suit all types and sizes of businesses from starter units to major occupiers, including UPS.</p> <p>In terms of ownership, units are held on a mixture of freeholds and long leaseholds from Southampton City Council.</p>		
Adjacent land use and conflicts	Southampton Port and the main Millbrook Road, Mountbatten Way as well as residential to the far west.		
Known constraints and infrastructure requirements	Geared ground leases with Southampton City Council. West Quay Road suffers with congestion at peak times.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	

Strategic Planning and Access	Good transport links, proximity to port.
Recommendation	Site score: B – above average Safeguard site for B1(c), B2 and B8 employment related uses.

Site Name: South of West Quay Road			
Site Ref:	REI10iii and REI9xiii	LSH ref	2
Borough:	Southampton	Size (ha)	Over 10
Description of Site and Location:	<p>Industrial areas The site is situated immediately opposite West Quay Retail Park, Ikea and adjoins the Leisure World complex with Southampton Port to the rear of both sites.</p>		
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>In terms of ownership REI 10 (iii) and REI 10 (xiii) are owned by Southampton City Council.</p> <p>City Industrial Park comprises a multi-let industrial/warehouse estate built in the 1980s. The John Lewis unit was built in the 1970s/80s. REI 10 (xiii) comprises car showrooms and older style industrial units of varying sizes and some modern trade counter uses.</p>		
Adjacent land use and conflicts	West Quay and Southampton Port.		
Known constraints and infrastructure requirements	Geared ground leases with Southampton City Council and West Quay Road suffers with congestion at peak times.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		Yes	
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	
Strategic Planning and Access	The site is safeguarded for B1(c), B2 and B8 uses. The site is well connected to the road network and public transport links with Southampton Central in close proximity. Casino and cinema complex to south of West Quay Road. No residential properties in close proximity.		

Recommendation	Site score: B – above average It is our recommendation that these two sites are proactively managed for employment related uses in the short to medium term, in the longer term they will form a part of the CBD.
-----------------------	---

Site Name: Empress Road			
Site Ref:	REI11 xvi, REI10 vi, REI11 xvii	LSH Ref	3
Borough:	Southampton	Size (ha)	Over 10
Description of Site and Location:	<p>The site is situated to the northeast of the city centre, off Thomas Lewis Way with access to J5 of the M27 approximately 4 miles to the north.</p> <p>The site is currently used for B1(b) and B1(c) employment uses which comprise older style tradition industrial/warehouse units of varying sizes.</p>		
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?		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	<p>The site is broken up into seven different areas and is a well-established estate. Site REI 10 (vi) includes a section of land used by Network Rail.</p>		
Adjacent land use and conflicts	<p>Surrounding the site to the south and west is a mixture of retail and residential; to the east are railway lines and the River Itchen</p>		
Known constraints and infrastructure requirements	<p>Flood Risk and limited access for HGV vehicles.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		B1(b) or B1(c)	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	<p>An industrial site adjacent to the train line, residential properties and a local retail centre. Reasonable access to the road network directly onto Thomas Lewis Way. Good access to public transport.</p>		

<p>Recommendation</p>	<p>Site score: D – below average</p> <p>Site is suitable for B1(b) and B1(c). It is our recommendation that the site continues to be managed for employment related uses.</p>
------------------------------	--

Site Name: Mountpark, Southampton			
Site Ref:	REI9ii, REI10ix, x, viii	LSH Ref	4
Borough:	Southampton	Size (ha)	Over 10
Description of Site and Location:	<p>The site is the former Ford production warehouse totalling approximately 19.59 ha.</p> <p>The site adjoins the M27 (J5) to the south of Southampton Airport and mainline Southampton Parkway railway station. It therefore has good communications by road, rail, air and bus.</p>		
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>The site is key strategic site, formerly occupied by Ford Motor Group, is now mainly in the ownership of Mountpark Developments and we understand, awaiting planning permission for employment related uses to include B8 distribution, warehouses.</p>		
Adjacent land use and conflicts	<p>Residential to the Southampton; Southampton Cemetery to the east; to the west is playing fields and to the north is Southampton Airport, industrial land and the M27.</p>		
Known constraints and infrastructure requirements	<p>Due to its close proximity with the airport, there may be construction restrictions in place.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	<p>Site has good links by road to the motorway network and Southampton Airport</p>		

Recommendation	Site score: A – high Retain safeguards on land for B1(b), B1(c), B2 and B8. This is a key strategic site and employment related uses should be retained on any future development.
-----------------------	--

Site Name: Test Lane South			
Site Ref:	MSA19	LSH ref	5
Borough:	Southampton	Size (ha)	5-10
Description of Site and Location:	The site is situated to the south of the Nursling Industrial Estate, off J1, M271 motorway, approximately 1 mile from J3, M27 motorway. The site has recently been purchased by Evander Properties, from Southampton City Council.		
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	Planning permission, subject to conditions, was granted in October 2015 for a B1 and B8 development of three units of 50,000 sq ft, 40,000 sq ft and 117,000 sq ft. We understand that the speculative development will commence on satisfaction of the conditions.		
Adjacent land use and conflicts	Residential to the south; Daily Echo offices and printing works to the north; M271 motorway to the east and railway line and marshland to the west.		
Known constraints and infrastructure requirements	It is understood that various steps are being taken by the developer, as part of their planning conditions, to address various environmental issues, such as potential flooding, noise pollution and highways improvement.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	Yes		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
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		
Strategic Planning and Access	The site is allocated as being suitable for B1 and B8 uses and should be retained for these uses.		

Recommendation	Site score: A – high The site is safeguarded for B1 and B8 employment related uses.
-----------------------	---

Site Name: Northam Triangle Area			
Site Ref:	REI10 xi	LSH Ref	6
Borough:	Southampton	Size (ha)	5-10
Description of Site and Location:	This site is in multiple ownership and situated close to St Mary's Football stadium on the A3024. The majority of properties here are held on long leaseholds from the City Council with geared ground rents. The Northam Triangle site is one of the Cities traditional industrial areas developed largely since the 1950's.		
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?	No		
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?	Unknown		
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	It serves marine related occupiers and other traditional B1, B2 and B8 occupiers; however, it is remote from the motorway network which is approximately 5 miles to north (J5, M27).		
Adjacent land use and conflicts	Redundant gas works to the west; residential to the north and south; aggregate sites adjacent to the River Itchen and Southampton Football Stadium to the south.		
Known constraints and infrastructure requirements	Potential flood and contamination issues due to proximity with the River Itchen and redundant gas works. Re-negotiation of geared ground leases with Southampton City Council.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	Yes		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Yes		
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		
Strategic Planning and Access	Good links with public transport and road network.		

<p>Recommendation</p>	<p>Site score: D – below average</p> <p>Retain existing protection for stated uses.</p>
-----------------------	--

Site Name: Oakley Road			
Site Ref:	REI10 xx	LSH Ref	7
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	The site adjoins the junction of Teboura Way (A35) and Oakley Road in a mixed commercial and residential area. It lies to the north of the docks area and the west of the City Centre. Opposite the site is a Tesco superstore.		
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?	No		
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	Buildings on the site are dated and currently occupied by storage users. We understand that the site is owned by a local developer.		
Adjacent land use and conflicts	Residential surrounding the site, with the A35 Tebourba Way to the west.		
Known constraints and infrastructure requirements	Development of the site may require highways improvements and potential conflicts with adjoining residential.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	Yes		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
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		
Strategic Planning and Access	Site is safeguarded for light industrial, general industrial and distribution uses within Classes B1 (c), B2 and B8.		

Recommendation	Site score: E – low Potential conflict between B2 and B8 uses with neighbouring residential.
-----------------------	--

Site Name: Northbrook Industrial Estate			
Site Ref:	REI11 x	LSH Ref	8
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	The site is located in a residential area to the north-west of the Southampton conurbation close to the General Hospital. It comprises a multi-let estate built in the 1960's.		
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	High site coverage and restricted access. On the estate the units are typically small in size (circa 500 sq m) serving a number of SME's.		
Adjacent land use and conflicts	Residential		
Known constraints and infrastructure requirements	Surrounded by residential with restricted access on the immediate surrounding roads.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	Yes		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
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		
Strategic Planning and Access	Site abutted on all sides by residential development. Road network only accessible through residential areas. Not suitable for B2 or B8 uses.		

<p>Recommendation</p>	<p>Site score: E – low</p> <p>Site suitable for light industrial uses and research and development.</p>
-----------------------	--

Site Name: South of Costco			
Site Ref:	REI11 xviii and REI xvii	LSH Ref	9
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	The site adjoins the main Millbrook Road West (A33) trunk road. The site is situated to the south of Costco Wholesaler's, with residential to the east and west. To the south is the A33 dual carriageway, railway lines and Southampton Port.		
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	<p>Existing use of Site REI 11 (xviii) is for the Territorial Army training base, whereas Site REI 11 (xvii) houses the Solent Business Centre (owned by Southampton City Council) and a car auction house/showroom and an office building.</p> <p>Solent Business Centre is an older style property and comprises small start-up workshops and office accommodation.</p>		
Adjacent land use and conflicts	Residential to the east and west; A33 dual carriageway to the south and Costco and BAT offices and R & D centre to the north.		
Known constraints and infrastructure requirements	Given the surrounding residential properties, any larger scale development could give rise to infrastructure improvements. Comprehensive redevelopment would be favoured, but relies upon government releasing Blighmount facility and relocation of social uses.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.	Yes		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
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		
Strategic Planning and Access	Site is protected for B1(b) and B1(c) uses. Good transport links to road networks and close to the port. Highly visible from Millbrook Road		

Recommendation	Site score: D – below average Site should be retained for B1(b) and B1(c).
-----------------------	--

Site Name: Pitt Road / Liners			
Site Ref:	REI11 xiii	LSH ref	10
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	The site is situated in a principally residential area, accessed off residential roads and within approximately 2 miles to Southampton city centre. It comprises a multi-let industrial estate with local occupiers, including vehicle workshops.		
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?		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	Older units with poor internal highway arrangements The site is not suitable for B8 use and B1/B2 uses could potentially conflict with the surrounding residential.		
Adjacent land use and conflicts	Residential.		
Known constraints and infrastructure requirements	We would expect there to be 'hours of use' restrictions in place for employment related use.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		Yes	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	The site is located in an area with good links to the road network.		

Recommendation	Site score: E – low Retain protection of land for B1(b) and B1(c). Not suitable for general industrial (B2) or storage and distribution (B8).
-----------------------	---

Site Name: Millbrook Road East			
Site Ref:	REI11xiv	LSH Ref	11
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	<p>The site is situated on Millbrook Road East, in a predominantly residential location to the west of Southampton City Centre and south of Shirley High Street, a suburb of Southampton.</p> <p>It comprises a mixed development of B1(a) and B1(c) properties built over the last 50 years. There is a reasonable take-up of space from office and industrial occupiers.</p>		
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	Any future development is likely to be of a small scale, on a piecemeal basis and would have to be sympathetic to the surrounding area.		
Adjacent land use and conflicts	Residential.		
Known constraints and infrastructure requirements	Hours of use; restrictions for light industrial uses; access via residential roads		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	Site is located in a predominantly residential area. Reasonable access to road network through residential areas.		

Recommendation	Site score: E – low Continue to safeguard site for B1(b) or B1(c) as well as other employment uses.
-----------------------	---

Site Name: Central Trading Estate			
Site Ref:	AP 3	LSH Ref	12
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	<p>The site is located in a Northam industrial area, to the east of Southampton City Centre, south of Southampton Football Club and close to the River Itchen.</p> <p>The majority of the site known as Central Trading Estate is owned by an institutional investor, Coal Pension Properties, managed by LaSalle Asset Management. We understand that the freehold of the site is owned by Southampton City Council, with long leasehold interests.</p>		
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	The buildings typically comprise B1 and B8 1960s/70s construction. Demand for the properties is relatively good.		
Adjacent land use and conflicts	The proposed residential and employment allocated Chapel Riverside development is nearby. To the west of the site is a railway line, serving the eastern docks, and Southampton City College, with residential to the south of the site and St Mary's Stadium to the north. To the east is the aggregate wharves on the River Itchen.		
Known constraints and infrastructure requirements	Residential to the south and railway lines to the west, Stadium to the north and wharves to the east.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		Yes – Southampton Football Club or employment uses	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		Yes	
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	
Strategic Planning and Access	Reasonable public transport links and access to road network, proximity to city centre and Eastern Docks		

Recommendation	Site score: C – average Safeguard for employment uses (B1c, B2 and B8) however suitable development linked to expanding the football stadium or as part of a comprehensive regeneration of the wider area could be considered acceptable for part of the site.
-----------------------	--

Site Name: Centurion Industrial Park			
Site Ref:	REI10 v	LSH Ref	13
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	The site is situated on the eastern edge of the River Itchen, off the main A3024 Bitterne Road, which is the principal arterial road into Southampton city centre from the east. We understand the site is owned by Staffordshire Pension Fund and asset managed by Colliers International. The site comprises a multi-let industrial estate and trade counters, built in the 1970s/80s with the rear part of the site having been developed more recently and approximately 1 acre remains undeveloped		
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?			In part
Market Appraisal	. Given the prominence of the site, it could attract higher value uses in the future such as out-of-town retail and residential.		
Adjacent land use and conflicts	The River Itchen bounds the site to the south and west. To the east there is a residential development, which was constructed after the Centurion estate was built.		
Known constraints and infrastructure requirements	It is understood that the site may be subject to flood risk. In addition, the A3024 Bitterne Road does suffer from congestion at peak times. With the recent residential development close by, this may present issues surrounding the use of this site, in the future.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
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
Strategic Planning and Access	Good transport links to road network.		

Recommendation	Site score: C – average Continue to safeguard site for B1(c), B2 and B8 employment related uses.
-----------------------	--

Site Name: West of Meridian			
Site Ref:	REI10xiv	LSH Ref	14
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	The site is situated on the western edge of the River Itchen, close to the main A3024 Bitterne Road, which is the principal arterial road into Southampton city centre from the east. We understand the site is in mixed ownership by local investors/developers. The site predominantly comprises a multi-let industrial estate, built in the 1970s/80s. To the west of the site is the mainline London Waterloo railway line, which connects Southampton/Bournemouth.		
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	To the eastern edge of the site is the former Meridian TV site, which is in the process of being developed by Inland Homes for residential purposes. To the south of the site are railway maintenance depots.		
Adjacent land use and conflicts	The River Itchen bounds the site to the northeast. To the east there is the proposed residential development and to the west is the mainline railway.		
Known constraints and infrastructure requirements	It is understood that the site may be subject to flood risk. In addition, the A3024 Bitterne Road does suffer from congestion at peak times. The railway level crossing hampers access to the east. With the proposed residential development close by, this may present issues surrounding the use of this site, in the future.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	Reasonable transport links (but not to the west or north). Site identified as suitable for B1(c), B2 and B8.		

Recommendation	Site score: D – below average The site is suitable for employment related uses, such as B1, B2 and B8, and should be retained for such purposes. However, it could come under pressure in the future, given the redevelopment of the Meridian site for residential purposes.
-----------------------	--

Site Name: Quayside Road			
Site Ref:	REI11 i	LSH Ref	15
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	<p>The site is situated on the northern edge of the River Itchen, off the main A3024 Bitterne Road, which is the principal arterial road into Southampton city centre from the east.</p> <p>Typically, the buildings are older style, traditional properties which were built circa 1950s/60s, some of which is occupied by marine related businesses given the close proximity to the quayside.</p> <p>There has been more recent residential development in the immediate area and the site adjoins a primary school.</p>		
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	Given the location of the site, it is likely to come under pressure for residential redevelopment.		
Adjacent land use and conflicts	The River Itchen bounds the site to the south. To the north and west is residential and to the east, a primary school.		
Known constraints and infrastructure requirements	It is understood that the site may be subject to flood risk. In addition, the A3024 Bitterne Road does suffer from congestion at peak times. Access to the A3024 is through residential areas which is a limiting factor.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	Safeguarded for B1(b) and B1(c). Reasonable road access through residential areas and possible conflict with primary school opposite for uses generating significant traffic increases or heavy lorries.		

Recommendation	Site score: D – below average Retain existing safeguards for light industrial and research and development. Restrict development of B2 and B8 uses. B1A uses should be ancillary. However, we recommend that the southern section of the site be retained for marine employment uses.
-----------------------	---

Site Name: Portswood Road			
Site Ref:	REI10 vii	LSH Ref	16
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	The site fronts the A335 Thomas Lewis Way, which is the main arterial route connection J5, M27 to Southampton. It comprises a multi-let industrial estate built in the 1970s/80s, which we understand is owned by Southampton City Council and let to local and national occupiers.		
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	The site is a well-established, multi let industrial estate. Given its good access to the motorway and Southampton City Centre, demand for properties is good, subject to market conditions.		
Adjacent land use and conflicts	Residential to the north, south and west; A335 dual carriageway to the east. Further to the east is the railway line and a water treatment plant and the River Itchen.		
Known constraints and infrastructure requirements	We understand that there may be a restriction on the hours of use and any intensification of development would impact on the immediate road network.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	Reasonable access to road network		

<p>Recommendation</p>	<p>Site score: C – average</p> <p>Site should retain safeguards as B1(c), B2 and B8.</p>
-----------------------	---

Site Name: Ashley Crescent			
Site Ref:	REI10 i	LSH Ref	17
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	<p>The site is situated to the east of Southampton, fronting onto the A3025 Portsmouth Road, which links Woolston, a suburb of Southampton, to J8 of the M27.</p> <p>There is a diverse range of buildings and uses on site, including a cash and carry, vehicle showroom with workshops, educational establishment and a scrap yard to the rear of the site. Typically, buildings are older, more traditional in style, which were built over 30 years ago.</p>		
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	To the front of the site more recent refurbishment of buildings has been carried out, including the car showroom.		
Adjacent land use and conflicts	To the southwest of the site is an educational establishment and residential properties are situated to the south north and west. To the east are woodlands as well as Veolia Environmental Services site.		
Known constraints and infrastructure requirements	There could be potential contamination issues from the scrap yard and waste facilities, which affect any future development. Partial redevelopment could be inhibited by scrapyards and waste services uses.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	The site has reasonable access to the road network		

Recommendation	Site score: D – below average Safeguards for site as B1(c), B2 and B8 should remain.
-----------------------	--

Site Name: Meridian			
Site Ref:	MSA16	LSH Ref	18
Borough:	Southampton (Part)	Size (ha)	
Description of Site and Location:	Mixed employment site to east of Northam Road. The site has planning permission for residential led development which is under construction so has not been considered further		
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?		Yes	
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?		No	
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	The site is situated on the southern edge of the River Itchen, close to the main A3024 Bitterne Road, which is the principal arterial road into Southampton city centre from the east. We understand the site is owned by Inland Homes and construction of 1, 2 and 3 bed apartments and 3 bed houses has commenced.		
Adjacent land use and conflicts	The River Itchen bounds the site to the north. To the west there and industrial development and to the south is residential.		
Known constraints and infrastructure requirements	It is understood that the site may be subject to flood risk. In addition, the A3024 Bitterne Road does suffer from congestion at peak times.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		No	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		Yes	
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	
Strategic Planning and Access	The site has a high accessibility level via public transport.		

<p>Recommendation</p>	<p>Site score: D – below average</p> <p>Residential development has commenced on this site.</p>
-----------------------	--

Site Name: City Commerce Centre			
Site Ref:	REI10 xii	LSH Ref	19
Borough:	Southampton	Size (ha)	
Description of Site and Location:	<p>The site is situated in Southampton city centre within a mixed commercial and residential area, adjacent to the A33 Marsh Lane, which is part of the Southampton ring road.</p> <p>It is a multi-let/owner-occupied industrial estate with a mix of local and national operators, which was built in the 1970s/80s. Units range in size from 1,000 sq ft to 10,000-15,000 sq ft.</p>		
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	<p>In the last 5 years, the immediate road network has undergone substantial investment including improvement/upgrade works to Central Bridge and Platform Road.</p>		
Adjacent land use and conflicts	<p>In the immediate vicinity is student accommodation, offices, mixed-use development including retail and employment related uses.</p>		
Known constraints and infrastructure requirements			
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
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
Strategic Planning and Access	<p>Reasonable access to road network</p>		

Recommendation	Site score: B – above average Continue to safeguard site for employment uses. Some General Industrial uses and Storage and Warehouse uses may conflict with residential amenity to the north of the site.
-----------------------	---

Site Name: South of Itchen Bridge / Floating Bridge Road			
Site Ref:	REI10 xvi	LSH Ref	20
Borough:	Southampton	Size (ha)	
Description of Site and Location:	<p>The site comprises a small scale multi-let/owner-occupied industrial estate, known as Longbridge and Crosshouse Industrial Park. It fronts Floating Bridge Road, which adjoins Itchen Toll Bridge. The River Itchen lies to the east and south of the site, in the near distance.</p> <p>Units range in size from 750 sq ft to 2,000 sq ft. The freehold is owned by Southampton City Council and subject to long leasehold interests granted to investors/owner-occupiers.</p> <p>Surrounding the site is mixed-use commercial and residential, including the Ocean Village development and marina to the south. To the north the site is adjoined by further industrial and warehousing uses beyond which is the proposed Chapel Riverside mixed-use development. To the east is Southampton Water Activities Centre, adjoining the River Itchen.</p>		
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 comprises primarily small, secondary industrial units, which principally attracts local occupiers providing a regular churn of tenants typically on short term leases.		
Adjacent land use and conflicts	Residential to the south and River Itchen to the east		
Known constraints and infrastructure requirements	<p>We understand that there is potential for flood risk on the site.</p> <p>Any redevelopment would require the geared ground leases from Southampton City Council to be renegotiated.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		Yes	
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	

Strategic Planning and Access	Reasonable access to road network. Close to Eastern Docks and City Centre
Recommendation	Site score: C – average Retain safeguard for B1(b) and B1(c) plus other employment uses compatible with the neighbouring residential developments.

Site Name: Test Lane North			
Site Ref:	RE11 ix	LSH Ref	21
Borough:	Southampton	Size (ha)	5-10
Description of Site and Location:	The site is situated to the south of the Nursling Industrial Estate, off J1, M271 motorway, approximately 1 mile from J3, M27 motorway. We understand that occupiers on this site are primarily Newquest Media (Southern) Limited's HQ/offices/printing and distribution facility, and to the north of the site is part of the Yeoman Industrial Estate – a small scale multi-let industrial development have been constructed within the last 20 years approximately.		
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?		No	
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	<p>The site to the south has recently been purchased by Evander Properties, from Southampton City Council. Planning permission, was granted for a B1 and B8 development (see Test Lane South).</p> <p>There are improvements being carried out to J1 of the M271, as part of the new Lidl warehouse development.</p>		
Adjacent land use and conflicts	Vacant site to be development for employment related uses to the south; to the north is Yeoman Industrial Estate. The M271 motorway lies to the east and railway lines and marshland to the west.		
Known constraints and infrastructure requirements	It is understood that as part of the proposed development to the south, road improvements will take place to include a widening of Test Lane. In addition, the developer is understood to be carrying out other improvements as part of their planning conditions.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		Yes	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	

Strategic Planning and Access	Land safeguarded for B1(b) and B1(c) uses. Excellent links with road network.
Recommendation	Site score: B – above average Site suitable for employment uses including B2 and B8 and should be protected for this use in the future.

Site Name: Redbridge Causeway Garage			
Site Ref:	REI11 viii	LSH Ref	22
Borough:	Southampton	Size (ha)	
Description of Site and Location:	<p>The site fronts onto the busy A35 Totton By-pass, adjacent to the Millbrook Flyover at the bottom of the M271 that connects Southampton city centre/docks to J3, M27.</p> <p>We understand the site is currently owned and used by Adams Morey.</p>		
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?		No	
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?		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>We understand that the site is owned by Adams Morey, for a truck showroom, servicing and parts distribution facility. The facility is over 30 years old, but has undergone refurbishment during this time.</p> <p>Given the prominence of the site, alternative higher value uses are likely to be attracted to the site in the future, should it become available.</p>		
Adjacent land use and conflicts	<p>To the immediate north of the site is residential and beyond this is the proposed Test Lane South development. To the west of the site is the River Test and to the south is the A35. Beyond that is a mixed-use commercial and residential area.</p>		
Known constraints and infrastructure requirements	<p>Given the location and accessibility of the site, adjacent to the busy A35, any future development may require highways improvements.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		Yes	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	<p>Site is safeguarded for B1(b) or B1(c). It is adjacent to residential areas with good links to the road network.</p>		

Recommendation	Site score: C – Average Suitable for B1(b) and B1(c) and likely to come under pressure from higher value uses, due to its main road prominence. May not be suitable for B2 or B8 due to close proximity to residential.
-----------------------	---

Site Name: BAT Remainder			
Site Ref:	RE19 (i)	LSH Ref	23
Borough:	Southampton	Size (ha)	Under 5
Description of Site and Location:	<p>The site is situated to the north of the main Millbrook Road West (A33) trunk road, adjoining Costco Wholesaler's, with residential surrounding the subject site. To the south is the A33 dual carriageway, railway lines and Southampton Port.</p> <p>The entire site remains within the ownership of British American Tobacco and is currently used predominantly as offices, with some research and development.</p>		
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?			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?			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	Should BAT vacate the site in the future, it is likely to come under pressure from alternative uses including residential. The site is not in a recognised office location and therefore future employment related uses may be limited. Given the scale of BAT's ongoing investment in the site it would seem unlikely that they would vacate in the next few years		
Adjacent land use and conflicts	Retail warehouse to the south and residential surrounding the remainder.		
Known constraints and infrastructure requirements	Given the surrounding residential properties, any larger scale development could give rise to infrastructure issues and potential conflict with residential.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
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

Strategic Planning and Access	Good public transport links and access to road network. Proximity to Port of Southampton
Recommendation	Site score: D – below average Should BAT vacate the site in the future, the site could be viable for some employment development..

Site Name: North of Parks			
Site Ref:	AP2	LSH ref	24
Borough:	Southampton	Size (ha)	
Description of Site and Location:	<p>CCAP prime existing office area AP2</p> <p>The site is a mixed-use area in multiple ownership. New developments are coming forward by way of a new hotel on the Southampton Park Hotel site and student accommodation on The Bond site</p>		
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>Given the site's proximity to local amenities, such as train and bus services as well as the retail area of London Road and the Cultural Quarter, we foresee that the site will remain as a mixed-use development, including hotel, residential, student accommodation and offices.</p>		
Adjacent land use and conflicts	<p>A mix of residential, car parking and offices to the north and parks to the south.</p>		
Known constraints and infrastructure requirements	<p>Some listed buildings on Cumberland Place frontage</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
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
Strategic Planning and Access	<p>Development that results in the net loss of office space in this area will be resisted unless there are clear economic benefits (although recent legislation means that the council have limited controls to prevent prior approval conversion to residential). Located within the City Centre with good public transport links and access to the road network. There are small scale development opportunities within this area.</p>		

Recommendation	Site score: A – high The site is in an excellent location for occupiers and will present opportunities for further office employment development.
-----------------------	---

Site Name: North of Station			
Site Ref:	AP2	LSH Ref	25
Borough:	Southampton	Size (ha)	
Description of Site and Location:	CCAP prime existing office area AP2. Immediately adjoining railway station and hub of bus routes. Within walking distance of main city centre shopping areas. The area contains primarily 1970s office buildings with some conversion to residential having taken place		
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	Prime redevelopment site at the gateway to the City. Significant opportunity for high quality mixed use employment led development. Potential for redevelopment or refurbishment of existing Nelson Gate complex and office, residential, hotel development on adjoining vacant site. In the longer term commercial and residential development as part of redevelopment of station		
Adjacent land use and conflicts	Train station and Wyndham Court residential properties		
Known constraints and infrastructure requirements	None		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		Yes	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
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	
Strategic Planning and Access	Development that results in the net loss of office space in this area will be resisted unless there are clear economic benefits. Located within the City Centre with good public transport links and access to the road network. There are development opportunities within this area.		

Recommendation	Site score: A – high Solely office scheme would not be commercially viable, however this is a prime development site and an element of office development would be suitable as part of a master mixed use scheme, being a strategic gateway into the city, to include public realm.
-----------------------	---

Site Name: Carlton Crescent			
Site Ref:		LSH Ref	26
Borough:	Southampton	Size (ha)	
Description of Site and Location:	<p>CCAP prime existing office area AP2 Carlton Crescent is located within a conservation area and historically, has been a strong employment area due to its vicinity to the Law Courts. The majority of the buildings outlined on the plan, are Grade II Listed buildings, which were converted from residential to office use many years ago.</p> <p>The area has been a popular location for Barristers Chambers and solicitors' offices due to its close proximity to the Law Courts. However, the influence of the Law Courts is now less and there is a general move for office use in other areas of the city. The City Centre Action Plan is concentrating on the area between the train station and the waterfront as the area for CBD.</p> <p>It is well connected, both in terms of infrastructure and amenities. The area is serviced by a good bus service and the train station is less than one mile away. The Bedford Place and London Road retail areas provide a good mix of banks, sandwich bars, café's, local supermarkets and public houses. St Ann's school to the west.</p> <p>However, over recent years we have seen a few of the Grade II buildings converted back to their original use, as they no longer suit a modern office working environment.</p>		
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	Potential for conversion of existing listed buildings to residential uses.		
Adjacent land use and conflicts	Mixed use location with residential, commercial and retail.		
Known constraints and infrastructure requirements	Listed buildings and a conservation area.		

Strategic Planning Factors	
2.1: Is the site within an area identified as of strategic importance.	Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?	Office
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No, some small scale redevelopment opportunities
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
Strategic Planning and Access	Located within City Centre with good public transport accessibility
Recommendation	Site score: B – above average The site offers reasonable office accommodation.

Site Name: Willments/Hazel Road Area			
Site Ref:	REI10 xviii, REI10 xix, REI11 xii, REI10 xx	LSH Ref	27
Borough:	Southampton	Size (ha)	Over 10
Description of Site and Location:	<p>The sites are situated in Woolston, a suburb to the east of Southampton City Centre and bounds the eastern edge of the River Itchen. They are situated close to the Itchen Toll Bridge, one of the principal access routes in and out of the city centre.</p> <p>The sites are made up of mixed commercial buildings including dated traditional industrial/warehouse space on Willments Industrial Estate; more modern business unit development in Vancouver Wharf and RJ Mitchell Centre.</p>		
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?			In part, 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>The site comprises office, industrial and open storage uses. The units are primarily secondary in quality, which coupled with its poor links to the road network, limits its appeal in the wider market, although it is priced accordingly and does attract local businesses and provides an important function in its part of the low value market.</p> <p>A number of occupiers include marine and aggregate related businesses, being located close to the waterside.</p>		
Adjacent land use and conflicts	River Itchen to the west; railway line to the east with playing fields and residential beyond.		
Known constraints and infrastructure requirements	<p>We understand that there is potential for flooding on site. Parts of the site have been used as scrap yards and recycling, therefore contamination issues may exist. Sea wall in poor condition</p> <p>Any future development should include for improvements to highways.</p>		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes in part (marine users)
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
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

<p>Strategic Planning and Access</p>	<p>Previously earmarked for water related uses this site has become predominantly industrial. Water related development is welcomed along the River Itchen. However, nature conservation interests of international importance severely restrict access to the water. Part of the site is safeguarded for B1(b) and B1(c) uses. The site has poor links to the road network with one road in and out of the site.</p>
<p>Recommendation</p>	<p>Site score: D – Below average</p> <p>The site would not appear to be suitable for large scale industrial uses as it stands requiring large lorries in and out of the site. Nevertheless it should be protected for B1(b), B1(c) and B8 uses that do not require large lorry movements. Suitable for water related industries</p>

Site Name: Drivers Wharf Area			
Site Ref:		LSH Ref	28
Borough:	Southampton	Size (ha)	5-10
Description of Site and Location:	<p>Site is identified in two parts as a major site on opposite sides of Northam Road. The western side of the site is cleared and the eastern site is currently occupied by a mix of uses.</p> <p>The site is situated on the southern edge of the River Itchen, close to the main A3024 Bitterne Road, which is the principal arterial road into Southampton city centre from the east.</p> <p>We are aware the site has previously been promoted by SEEDA/HCA for employment related redevelopment and we understood this included the purchase of various interests within the subject site. We are not aware of any recent action by the HCA. The site is predominately owned by EMR – scrapyards, Peter Harding and SCC.</p> <p>Currently the site consists of older style, traditional industrial/warehouse buildings and a sites used for a variety of uses, such as open storage and vehicle yards.</p>		
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 provides an important function in his part of the low value market and meets local needs for small businesses		
Adjacent land use and conflicts	Surrounding the site, there is the River Itchen to the north; Northam residential estate to the south of Princes Street and the marine employment provision at Saxon Wharf to the east.		
Known constraints and infrastructure requirements	Quayside, multiple ownerships and highway infrastructure. The site might be subject to flooding and contamination given the nature of businesses and uses currently on site. The scrapyards on the eastern part of the site presents a difficult challenge unless it is relocated and the Northam Estate to the south also may inhibit the scale of redevelopment and uses.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes – Marine uses

2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Yes.
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
Strategic Planning and Access	The site benefits from high accessibility levels from public transport, proximity to the main highway network leading to Junctions 7 and 8 of the M27 and high visibility from Northam Bridge
Recommendation	<p>Site score: D– below average.</p> <p>Support proposals for employment led mixed use redevelopment comprising offices, light industrial and residential uses.</p>

Site Name: Northam Peninsula Area			
Site Ref:	REI10vii, REI13i, REI13ii, REI12i	LSH Ref	29
Borough:	Southampton	Size (ha)	5-10
Description of Site and Location:	<p>The site is situated on the western edge of the River Itchen, accessed from Millbank Street and close to the main A3024 Bitterne Road, which is the principal arterial road into Southampton city centre from the east.</p> <p>The overall site includes Saxon Wharf and Shamrock Quay which are marine developments and both owned, we understand, by Marina Developments Ltd. The remainder comprises Bakers Wharf (marine development), Elliotts Builders' Merchants and a number of other properties owned by investors, owner-occupier and property companies</p> <p>Currently the site consists of older style, traditional industrial/warehouse buildings and sites used for a variety of uses, predominantly marine related</p>		
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	This is an important site for the marine industries and small businesses associated with them with a range of property sizes accommodating a broad range of businesses.-		
Adjacent land use and conflicts	Surrounding the site, there is the River Itchen, residential opposite the western boundary and further employment sites to the south.		
Known constraints and infrastructure requirements	The site might be subject to flooding and contamination given the nature of businesses and uses currently on site.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Part – Water Related Industries
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to			No

<p>overcome infrastructure or on-site constraints to make employment development viable?</p>	
<p>Strategic Planning and Access</p>	<p>Site safeguarded in part for water related industries with associated specialist B1 and B2 uses and A1, A2, A3, A4 and A5 uses within the northern part of the site. Southern part of the site safeguarded for water related industries. Part of site also suitable for B1(c), B2 and B8.</p>
<p>Recommendation</p>	<p>Site score: D – below average</p> <p>Continue to safeguard water related industries on part of the site and permit A1 – A5 on other parts of the site and B1(c), B2 and B8 on appropriate parts of the site.</p>

Site Name: Centenary Quay Marine Employment Quarter			
Site Ref:	MSA18	LSH Ref	30
Borough:	Southampton	Size (ha)	
Description of Site and Location:	<p>A cleared site that has been decontaminated</p> <p>The site is an integral part of the riverside's rejuvenation. The development by Crest Nicholson of residential, apartments and proposed offices and restaurant.</p> <p>Owned by developer, Oceanic Estates Limited, who are progressing a planning application with an end user.</p>		
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	The site is well suited for marine and associated business development.		
Adjacent land use and conflicts	Immediately to the east is Woolston High Street a mixed commercial and residential area. Residential/commercial uses immediately to the south. To the north is residential development and to the west the River Itchen		
Known constraints and infrastructure requirements	The site might be subject to flooding. We assume that the road infrastructure and services to the site have already been made provision for future development. Residential conflicts with 24 hour use and some activities on site.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.			Yes
2.2: Is the site identified or likely to be required for a specific user or specialist use?			Yes
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			Yes
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
Strategic Planning and Access	Site is being redeveloped for a marine employment quarter.		

<p>Recommendation</p>	<p>Site score: B – above average</p> <p>This site is protected and should be retained for the marine quarter use or similar employment related uses.</p>
------------------------------	---