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1.0 Introduction

1.1 Bolsover District Council (‘BDC’) commissioned Nathaniel Lichfield & Partners (‘NLP’) to prepare an Economic Development Needs Assessment (‘EDNA’) for the Borough. It provides an important evidence base to inform the development of a new Local Plan, which seeks to guide development in the District to 2033. This study assesses the economic development needs objectively in line with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG). It will also inform the specific employment land requirements and determine where growth should be accommodated across the Borough.

1.2 The study has involved three main stages:

1. **Stage 1: Taking Stock of the Existing Situation**: analysis of the economic strengths and weaknesses of the local economy, functional economic area, and an assessment of the fitness for purpose of a portfolio of designated employment sites.

2. **Stage 2: Assessing Future Requirements**: testing the implications of different population/household growth scenarios on future employment space requirements for the Borough, including latest economic forecasts and housing targets.

3. **Stage 3: Identifying a Site Portfolio**: analysing the suitability and deliverability of sites available to meet future needs under each growth scenario, which sites should be retained for employment uses and which released for alternative uses, and any need for additional sites.

1.3 Scope of Study

The purpose of the EDNA is to provide part of the evidence base for the Council’s new Local Plan by providing BDC with an understanding of the current and potential requirements for employment land. This is based on considering a range of scenarios for how the Bolsover economy could change in the future.

1.4 Following from this analysis, the land and floorspace implications are specifically considered for the group of B-class sectors outlined below:

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

1.5 Demand for B-class employment land and floorspace is considered in this report, and references to “employment space” are intended to mean both these elements. Industrial space in this report includes both manufacturing and distribution uses.
1.6 The study also considers future projections for growth in non B-class sectors to set out how the overall economy of the area could change in the future, although it does not specify the space implications for each of these sectors individually as they are subject to separate, detailed reviews of future requirements and capacity planning through their own regulatory/statutory bodies (i.e. Health Trusts/Local Education Authorities/tourism boards) using different methodologies.

1.7 It should be noted that there are a variety of factors and drivers to consider when objectively assessing business needs for a local area. This study utilises a combination of both quantitative and qualitative analysis to explore these issues within the context of Bolsover District and synthesises these to draw overarching conclusions and implications. An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This study has incorporated the latest data and other evidence available at the time of preparation. The accuracy and sources of data derived from third party sources has not been checked or verified by NLP.

1.8 As part of the study, consultation was undertaken with a range of stakeholders including commercial agents, economic development and business organisations. A list of consultees is included at Appendix 1. As part of the duty to cooperate, a stakeholder workshop was held in Bolsover in August 2015 with Officers from BDC, adjoining authorities and agents & developers and comprised a presentation of interim findings and structured group discussion.

**Methodology**

1.9 In March 2014, the Government released Planning Practice Guidance (PPG) to provide practical support for practitioners and inform the implementation of the National Planning Policy Framework (NPPF). With regards to assessing economic development needs, the Guidance states that local authorities should:

a. Consider their existing stock of land, identifying the demand for and supply of employment land and determine the likely business needs and future market requirements;

b. Consider the locational and premises requirements of particular types of business;

c. Consider projections and forecasts to help identify where sites have been developed for a specific economic use;

d. Analyse supply and demand to identify whether there is a discrepancy between quantitative and qualitative supply and demand for employment sites; and

e. Identify where gaps in local employment land provision exist by comparing the available stock of land with the requirements of the area.
The methodology that has been used to undertake the EDNA conforms to the requirements of the NPPF and PPG and can be summarised in Figure 1.1 below.

Figure 1.1 ELNA Methodology

1.11 The report is structured as follows:

- **Policy Review** (Section 2.0) - a summary of current national, sub-regional and local planning policy and economic strategy documents that form part of the background context for the study;

- **Economic Context** (Section 3.0) – a review of current economic conditions and recent trends in the District and its economic strengths and weaknesses that may affect future needs for employment space;

- **Overview of B-Class Employment Space** (Section 4.0) – analysis of the current stock and trends of employment space in the District in terms of mix of uses, development rates, gains and losses, age of premises, and provision in adjoining local authority areas;

- **Commercial Property Market Signals and Intelligence** (Section 5.0) – a review of the local commercial property market, including the supply of and demand for different types of employment space within the District and the needs of different market segments;
• **Review of Employment Sites Portfolio** (Section 6.0) – analysis of a selection\(^1\) of the total potential supply of employment land in Bolsover and an overview of the findings of the site assessment process;

• **Understanding Business Needs** (Section 7.0) – summary of the key messages identified through engagement with local businesses and key economic stakeholders, as well as officers from the surrounding local authorities;

• **Growth Sectors** (Section 8.0) – an assessment of those sectors that could be expected to drive employment growth (and the demand for employment land) in Bolsover over the period to 2033

• **Future Requirements for Employment Space** (Section 9.0) – estimates future employment space requirements for B Class sectors in quantitative terms, drawing on an assessment of labour demand, labour supply and past take-up techniques;

• **Non-B Class Sectors** (Section 10.0) – high level review of historic demand and drivers of growth in non-B class uses including health facilities, education provision, leisure provision and hotels;

• **Demand/Supply Balance** (Section 11.0) – assesses the balance between current land supply and future needs, in both quantitative and qualitative terms, comparing forecast requirements with availability of existing sites;

• **Conclusions** (Section 12.0) – draws together the key findings from the preceding sections.

1.12 References to ‘Bolsover’ refer to the District overall rather than the town of Bolsover, unless otherwise stated.

\(^1\) Not all of the Council’s supply was included in the assessment. Sites that the Council were confident it would include as part of its future employment land supply, such as sites with planning permission were excluded from the assessment.
Policy Review

This section provides a summary of key planning policy and economic strategy documents that form part of the background context which the EDNA must take into account. Key messages from a range of documents – from the national level down to the local level – are set out below.

National Documents

National Planning Policy Framework (March 2012)

The Framework sets out the Government’s economic, environmental and social planning policies for England. It states [§14] that the purpose of the planning system is to contribute to the achievement of sustainable development, which should be seen as a ‘golden thread’ running through both plan-making and decision taking.

The document states that there are three dimensions to sustainable development: economic, social and environmental. The economic role that the planning system must perform involves contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and co-ordinating development requirements, including the provision of infrastructure [§7].

The Framework states that ‘significant weight’ should be placed on the need to support economic growth through the planning system [§19]. To help achieve economic growth, Local Plans should (inter alia) [§21]:

- Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- Support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances; and
- Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries.

The Framework [§22] also highlights that allocated employment sites for which there is no reasonable prospect of development should not be protected in the long term. Proposals for alternative uses on such sites should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.
2.6 The Framework [§23] confirms that offices are a 'main town centre use', and as such, LPAs should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance within an up-to-date Local Plan:

“*They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and LPAs should demonstrate flexibility on issues such as format and scale.*” [§24]

2.7 LPAs are required to ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. LPAs should ensure that their assessment of strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals. [§158]

2.8 The Framework [§160] advises that LPAs should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this, they should:

1. Work together with county and neighbouring authorities and with Local Enterprise Partnerships [LEPs] to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market; and

2. Work closely with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing, infrastructure or viability.

2.9 The Framework [§161] states that LPAs should use this evidence base to assess (*inter alia*):

1. The need for land or floorspace for economic development, including both the quantitative and qualitative need for all foreseeable types of economic activity over the plan period; and

2. The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs.

2.10 Public bodies have a duty to cooperate on planning issues that cross administrative boundaries [§178]. The Framework requires local authorities to demonstrate evidence of having effectively cooperated to plan for issues with cross-boundary impacts when their local plans are submitted for examination [§181]. It sets out where cooperation might be appropriate and what form it might assume. It concludes that "cooperation should be a continuous process of engagement from initial thinking through to implementation".
Planning Practice Guidance (2014)

2.11 CLG has produced on-line Planning Practice Guidance which includes guidance on the assessment of housing and economic development. This replaces the previous ODPM Employment Land Reviews: Guidance Note from 2004.

2.12 The Practice Guidance provides a methodology for assessing economic development needs. It states\(^2\) that plan makers should liaise closely with the business community to understand their current and potential future requirements.

2.13 Plan makers should also consider:

- The recent pattern of employment land supply and loss to other uses;
- Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums);
- Market signals such as levels and changes in rental values, and differentials between land values in different uses;
- Public information on employment land and premises required;
- Information held by other public sector bodies and utilities in relation to infrastructure constraints;
- The existing stock of employment land (though it is important to recognise that this may not reflect the future needs of business);
- The locational and premises requirements of particular types of business; and
- Identification of oversupply and evidence of market failure.

2.14 When examining the recent take-up of employment land, the Practice Guidance\(^3\) advises that it is important to consider projections (based on past trends) and forecasts (based on future scenarios) and identify occurrences where sites have been developed for specialist economic uses.

2.15 In terms of forecasting future trends the Practice Guidance\(^4\) advises that:

- Plan makers should consider forecasts of quantitative and qualitative need, but also its particular characteristics;
- Local authorities should develop an idea of future needs based on a range of data which is current and robust;
- Emerging sectors that are well suited to the area being covered by the analysis should be encouraged where possible; and,

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\(^2\) 2a-030-20140306
\(^3\) 2a-031-20140306
\(^4\) 2a-032-20140306
The available stock of land should be compared with the particular requirements of the area so that ‘gaps’ in local employment land provision can be identified.

2.16 The Practice Guidance advises that plan makers should also consider:
- Sectoral and employment forecasts and projections (labour demand);
- Demographically derived assessments of future employment needs (labour supply techniques);
- Analysis based upon the past take-up of employment land and property and/or future property market requirements;
- Consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics.

2.17 In identifying the type of employment land needed the Practice Guidance advises that:
- The need for rural employment should not be overlooked;
- Underlying population projections can be purely demographic or tied to future housing stock which needs to be assessed separately; and
- Plan makers should be careful to consider that national economic trends may not automatically translate to particular areas with a distinct employment base.

2.18 In order to derive employment land requirements, the Practice Guidance states that when translating employment and output forecasts into land requirements there are four key relationships which need to be quantified:
1. Standard Industrial Classification sectors to use classes;
2. Standard Industrial Classification sectors to type of property;
3. Employment to floorspace (employment density); and,
4. Floorspace to site area (plot ratio based on industry proxies).

Sub-Regional Documents

Derby, Derbyshire, Nottingham and Nottinghamshire Local Enterprise Partnership (D2N2) Strategic Economic Plan (SEP) (2014)

2.19 The D2N2 Local Enterprise Partnership’s (LEP’s) Strategic Economic Plan seeks to narrow the gap between the D2N2 region and other parts of the country. The core vision of the strategy is for D2N2 to become:
"A more prosperous, better connected, and increasingly competitive and resilient economy, at the heart of the UK economy, making a leading contribution to the UK’s advanced manufacturing and life sciences sectors and generating significant export earnings for UK plc. We will create a D2N2 which provides a great place to live, work and invest."

2.20 In order to deliver this ambition, the Strategy aims to create:

- 55,000 additional private sector employee jobs in the D2N2 area between 2013 and 2023;
- 77,000 additional homes to accommodate the growing population;
- A step change in skills levels amongst the workforce and young people; and
- A significant increase in the business base.

2.21 The Strategy notes that D2N2 benefits from a number of competitive advantages that will support the delivery of these targets, including:

- **Connectivity:** 90% of the UK is within 4 hours drive;
- **World class advanced manufacturing companies:** such as Rolls Royce, Boots, Toyota, Bombardier, Nestle amongst many others;
- **Key economic drivers:** including a core city with a City Deal (Nottingham), a key city (Derby) and two other major conurbations (Chesterfield and Ashfield and Mansfield);
- **Innovation:** leveraging universities and excellence in R&D;
- **A commitment to deliver growth:** despite a challenge to secure viability; and
- **A high quality natural environment:** making the area an attractive place to live, work and invest.

2.22 The Strategy also highlights a number of sectors offering strong growth potential, including:

- **Transport Equipment Manufacturing:** including the production of aerospace, automotive and rail transport vehicles and comprising of a number of large and globally significant employers such as Toyota, Rolls Royce and Bombardier and their significant local supply chains;
- **Life Sciences:** driven by new and developing technologies, growing global wealth and an ageing population, D2N2 has experienced recent growth in the manufacture of basic pharmaceutical products and medical and dental instruments. The area is also home to over 200 medical technology firms;
- **Construction:** employing over 40,000 people in D2N2, the construction sector locally is relatively productive with output per worker estimated to be 9% higher than in the UK overall. The sector also contains a number of large employers including Morgan Sindall and Bowmer and Kirkland;
• **Food and Drink Manufacturing:** with a workforce of nearly 17,000 people, D2N2 has strong links to D2N2’s important agricultural base, and is home to a number of blue chip food manufacturers, including Thorntons, Warburtons, Nestle, Greencore, British Sugar and Pork Farms;

• **Visitor Economy:** key assets include the iconic landscapes of the Peak District and Sherwood Forest, stately homes, historical buildings (including the Derwent Valley Mills Unesco World Heritage Site), cultural attractions, sporting venues and waterways. The sector presents a number of opportunities for growth including the business tourism market, festivals and events, tactical marketing, branding and gateways and hubs;

• **Low Carbon Goods and Services:** D2N2 is key contributor to power generation in the UK and has significant research expertise in this area, with the potential to exploit the move to more renewable sources of energy. D2N2 plans to build on expertise in the low carbon transport technologies and dual fuels sector, including Toyota and Rolls Royce;

• **Creative Industries:** including video, film and photography, music, publishing, radio and TV, computer games, social media and the software. Particular employment specialisms in D2N2 lie in computer and software (especially in computer gaming and medical technology applications); and

• **Transport and Logistics:** key current and future assets include the East Midlands Airport, the proposed strategic rail freight hub to the north and the HS2 line with a proposed station at Toton. Major employers include East Midlands Trains (based in Derby), and new employers, such as Kuehne & Nagel Drinkflow Logistics, have been attracted to the area because of its strategic location.

2.23 In order to drive growth in these sectors, the plan sets out four key objectives, including the delivery of:

• **Innovation-led economic growth:** supported by a Business Growth Fund, which would help support SMEs and inward investors in key sectors;

• **Accelerating commercial and residential development:** supported by bringing forward/improving a number of key sites across the area, including Markham Vale Enterprise Zone;

• **A D2N2 Skills Deal:** designed to create/improve a number of education centres throughout the area, including the creation of a centre for higher levels skills in Chesterfield; and

• **HS2 and East Midlands Connectivity:** creating a taskforce to fully capture the benefits of HS2, and improvements to connectivity.

2.24 The creation of employment sites and premises that will enable indigenous businesses to grow and attract inward investors is also outlined as a key driver in supporting economic growth.
Sheffield City Region LEP Strategic Economic Plan (2014)

2.25 The Sheffield City Region Local Enterprise Partnership (LEP) is comprised of the nine local authority areas of Barnsley, Bassetlaw, Bolsover, Chesterfield, Derbyshire Dales, Doncaster, North East Derbyshire, Rotherham and Sheffield. The City Region encompasses more than 1.8 million people and approximately 700,000 jobs.\(^8\)

2.26 In order to guide development across the City Region, the LEP’s Strategic Economic Plan (SEP) sets out a focussed 10 year plan for private sector growth from 2015-2025. The overall aim of the Plan is to grow both business activity and jobs in order to narrow the economic gap between the performance of the City Region and the national average over the next 10 years. Key targets set out to deliver this ambition include:

- Creating 70,000 jobs;
- Increasing Gross Value Added (GVA) by 10% (or £3bn); and
- Creating 6,000 additional businesses beyond baseline growth rates.

2.27 The benefits of this growth are anticipated to result in lower levels of unemployment across the City Region, as well as higher levels of productivity, innovation and exports in key sectors such as: digital technologies; engineering; manufacturing; and low carbon.

2.28 The SEP recognises, however, that the City Region is a diverse economy that does not have a single dominant sector that is forecast to drive future growth. Rather, a mix of sectors are required to drive sustainable growth. In percentage terms the highest levels of forecast employment growth are expected to occur in:

- Transport and logistics;
- Sport, leisure and tourism; and
- Business, professional and financial services.

2.29 Despite lower forecasts in terms of jobs growth, the following sectors are anticipated to deliver productivity gains as a result of high levels of GVA growth per job:

- Creative and Digital Industries (CDI);
- Low carbon;
- Healthcare technologies; and
- Advanced manufacturing.

2.30 In order to support the delivery of the LEPs key targets, the SEP also sets out a number of measures, including:

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\(^8\) [http://sheffieldcityregion.org.uk/about/overview/]
• Capitalising on the City Region’s strengths, including: its central location, two Universities with world class research capabilities, large workforce, the UK’s number 1 Enterprise Zone for advanced manufacturing, significant visitor economy and proposed HS2 station;

• Capitalising on sector specialisms, especially in digital technologies, advanced manufacturing, engineering and materials;

• Attracting new firms to the LEP area through the creation of a stronger promotional strategy and foreign direct investment team focused on sector specialisms;

• Helping indigenous firms to grow through local recruitment and supply chains to support innovation and increase productivity. This will be further supported by the development of a skills programme;

• Supporting 600 additional business start-ups per year - focused on knowledge intensive sectors with export potential – in particular Creative and Digital Industries (CDI); and

• Increasing the number of firms exporting by 2023 by 2,150 through the implementation of an incentives package with support from the Growth Hub.

The SEP also comments that the City Region has significant capacity for additional development of employment land (new and existing), but that opportunities for commercial development must be supported by:

• Improved public transport connectivity to join up our key urban centres and prepare them to maximise the economic benefits from high speed rail;

• Local sustainable transport programmes that, when aggregated, make a significant impact in helping people access jobs and training;

• An infrastructure investment programme (SCRIF) to fund and finance the infrastructure plan; and

• A housing development strategy, which flexes the national programme to suit the market failure and site issues within the City Region.

For Bolsover specifically, the Growth Plan also identifies a number of key opportunities in relation to:

• The accessibility to the M1;

• Enterprise Zone sites at Markham Vale with plans to establish a major employment hub; and

• Strong employment growth projections anticipated in Bolsover in comparison to working age growth.


The Derbyshire Economic Strategy Statement brings together the growth objectives of all local authorities, private and third sector partners across Derbyshire. The core objective of the statement is to:
“Support economic growth in tomorrow’s Derbyshire: preserving what makes the County special and promoting activity that is inclusive to all regardless of geography or economic disadvantage.”

2.34 Underpinning this vision is a series of strategic objectives, including:

- Investing in infrastructure to improve connectivity and create the conditions for growth;
- Unlocking the potential of Derbyshire’s land and property assets;
- Attracting new businesses to diversify and grow the economy;
- Increasing the vitality and viability of towns;
- Raising business productivity by encouraging more higher value added and knowledge intensive businesses;
- Maximising the potential of the visitor economy;
- Strengthening the rural economy;
- Creating a skilled future workforce; and
- Tackling disadvantage and help hard to reach individuals and communities into economic activity.

2.35 For Bolsover specifically, the Strategy highlights the need to support the transition to higher value added businesses, open up employment land sites and raise skills levels. The Strategy also outlines a number of economic assets which can support the delivery of stronger economic growth, including:

- Strategic sites along the M1 corridor;
- Continued strength in manufacturing and engineering including technology based manufacturing;
- Good connectivity;
- A large catchment population;
- A range of cultural assets; and
- Strong economic links to North Nottinghamshire and South Yorkshire.

Local Documents

Bolsover Growth Strategy (2014)

2.36 Bolsover District Council and North East Derbyshire County Council’s Growth Strategy entitled: Unlocking Our Growth Potential, sets out the growth ambitions, priorities and approach proposed to enable local economic growth to create stability and prosperity.

2.37 The key focus of the strategy is to create:

- A vibrant economy and increasing employment;
- Homes that meet local needs; and
- Provision of the supporting infrastructure necessary to deliver it.
The Strategy recognises that significant residential development in Bolsover and North East Derbyshire is required over the next 10 years in order to support stronger economic growth. Unlocking employment sites to meet growth requirements is also identified as a key priority to address the current imbalance between the number of residents and the relatively low number of jobs.

As part of this, the Plan indicates there is a need to safeguard and improve existing employment sites and the employment land supply within Bolsover to provide an additional 185 hectares of land for employment use up to 2030. The key focus of development is on existing large public and private sector sites, including:

- The Avenue, Wingerworth;
- Biwaters, Clay Cross;
- Markham Vale Enterprise Zone;
- Former Coalite site;
- Brook Park, Shirebrook;
- Castlewood, M1; and
- Barlborough Links.

The Plan indicates that in terms of growth in employment figures, the key growth sectors for Bolsover up to 2030 will include: construction; professional, scientific & technical; and wholesale & retail. The manufacturing sector is anticipated to decline, although job losses are anticipated to be relatively small (-600 in Bolsover).


Bolsover District Council’s Economic Development and Housing Strategy aims to support the local economy and deliver new housing and commercial growth up to 2020. The core priorities of the Strategy are to:

- Support and encourage economic growth;
- Ensure a more balanced housing market;
- Support the development of existing and new business;
- Support the creation of employment pathways training opportunities; and
- Support housing growth.

Unlocking the capacity of major employment sites is viewed as a key element in supporting the delivery of these ambitions. However, the strategy also highlights a number of key challenges associated with this process, including:

- A legacy of large scale Brownfield sites, which require significant remediation and investment;
- Poor viability of commercial development may require assistance to help the area deliver its GVA and jobs growth forecast; and
The need to ensure that sufficient employment land is available to meet future job growth forecasts.

Overall, Bolsover is forecast to generate the fastest rate of employment growth within Derbyshire, with a net additional 4,100 jobs forecast by 2030. The District is also forecast to experience the highest level of GVA growth in Derbyshire over the period 2019 to 2030 – with growth of 2.7% per annum anticipated. As a result, the strategy indicates that there is a need to work in partnership to bring forward key employment sites and to promote development land and premises to growing businesses.

Key sectors outlined as offering the strongest growth potential include:

- Transport and storage;
- Accommodation and food service activities;
- Real estate; and
- Human health and social work activities.

Sector strengths are also identified in:

- Manufacturing;
- Construction;
- Information and Communications (Knowledge based economies); and
- Energy and Water.

3.0 Economic Context

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

Geography and Connections

3.2 Located in north east Derbyshire, Bolsover District is a predominantly rural authority covering an area of 16,000 hectares and with a population of c.76,700. The principal settlements within the local authority area include the four market towns of Bolsover, Shirebrook, Clowne and South Normanton.

3.3 Bolsover is located within both the Sheffield City Region Local Enterprise Partnership (LEP) are and the Derby, Derbyshire, Nottingham and Nottinghamshire Local Enterprise Partnership (D2N2 LEP) area. It is bounded by: North East Derbyshire and Chesterfield to the West, Amber Valley and Ashfield to the South, Bassetlaw and Mansfield to the East and Rotherham to the North.

3.4 The District benefits from excellent road links through Junctions 28-30 of the M1 as well as links to the A38 to the south, and A1/A60 trunk to the North. Bolsover also has good public transport infrastructure, with a network of bus routes and four rail stations (Whitwell, Creswell, Whaley Thorns and Shirebrook) within the District which serve the Robin Hood Line, providing frequent services connecting residents to destinations throughout Derbyshire and Nottinghamshire, as shown in Figure 3.1.

10 Source: ONS Mid-Year Population estimates, 2013
Economic Conditions and Trends

3.5 Current economic conditions and trends in Bolsover are summarised below, with comparisons made, where appropriate, with regional and national averages. Data is drawn from published Office for National Statistics (ONS) sources via Nomis and Experian Ltd. unless indicated otherwise.

Employment

3.6 Based upon data from Oxford Economics, it is estimated that there were 36,170 workforce jobs registered in Bolsover in Spring 2015 – an increase of 14,600 (68%) when compared to 1991 levels.

3.7 The proportion of B class jobs (those requiring office, factory or warehousing and distribution premises) in the District has increased by 6,610 over the same period, recording a higher rate of growth (78%) than the all sector average. As a result the proportion of employment accounted for by the B class uses has increased slightly from 39% in 1991 to 42% in 2015.

3.8 An analysis of B class growth over time shows that growth was primarily driven by strong performance over the period 2000 to 2008. Between 1991 and 1999, for instance, it can be seen that B class employment change was relatively modest, increasing from 8,500 to 9,300. Similarly, between 2009 and 2015 the number of B class jobs rose from 13,300 to 15,500. In contrast, B class jobs increased by 5,500 (from 8,300 to 13,800) between 2000 and 2008.
3.9 Much of the increase in the B class sectors was accounted for by office-based growth, with workforce jobs increasing by 4,220. This was achieved from a particularly low base of 1,040, representing a growth rate of more than 400%.

3.10 Discussions with local agents and stakeholders were unable to pinpoint any key inward investments or developments to which this scale of growth could be attributed. Further interrogation of the Oxford Economics time series data shows that much of this increase was recorded in a single year, with office employment increasing by 1,800 jobs between 2007 and 2008.

3.11 An analysis of the data by individual sector shows that this is attributable to the ‘professional, scientific and technical activities’ sector, with a jump in employment from 1,000 to 3,300 observed between 2007 and 2008.

3.12 Discontinuities in time series employment data of this nature can often be caused by:

1. An issue in the disaggregation of data from the regional to the local level; or
2. All of the jobs supported at the national level by a particular firm being erroneously attributed to a single location (often the registered address of the business11).

3.13 Mindful of the above (and the feedback received from agents and stakeholders with respect to the strength of the office market in Bolsover) it is considered that the analysis regarding growth in office employment within Bolsover should be interpreted with caution.

3.14 Employment growth in relation to the industrial sectors has been less pronounced. The number of manufacturing jobs in the District, for instance, increased by 460 between 1991 and 2015 (representing an increase of 8%). The number of warehousing and distribution jobs grew by 1,940. Whilst this corresponds to a growth rate of 134% an analysis of the time series data does not identify any significant 'spikes' in employment.

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11 IDBR data, which is understood to be less susceptible to such issues, shows a total of 2,045 jobs in the sector in 2014. Discussions with BDC officers have indicated that it is highly unlikely that 1,255 jobs have been lost since 2008. This may, therefore, suggest that the discontinuity in the Oxford Economics data has been caused by all of the employment supported by a particular firm being erroneously attributed to a single location.
In employment terms, the largest sector in Bolsover in 2015 is manufacturing (14.0%), while the other business services (12.6%)\(^{12}\), education (9.7%) and construction (8.8%) sectors also account for a high proportion of workforce jobs. Health & Care, whilst representing a relatively large employment sector in Bolsover (8.4%) is under-represented compared with Derbyshire (12.4%), regional (11.7%) and national proportions (12.7%) (Figure 3.4)\(^{13}\).

\(^{12}\)‘Other Business Services’ is an amalgam of ‘Administrative and Supportive Service Activities’ (comprising of SIC codes 77-82) and ‘Other Private Services’ (comprising of SIC codes 94-98). It is understood from Bolsover DC Officers that SIC 78 includes a large number of workers employed by the Employment Agency.

\(^{13}\)It should be noted that this analysis is underpinned by an assessment of Experian data, rather than Oxford Economics. This is because comparable data at the county, regional and national level was not made available to NLP by Oxford Economics.
As shown in Figure 3.4, historic working age population growth has significantly lagged behind jobs growth in Bolsover, a trend which is in contrast with a number of other local authorities within the sub-region, with the exception of South Derbyshire. This is likely to be driven by significant levels of new commercial development in Bolsover and South Derbyshire in recent years, which has outpaced housing growth.

**Productivity**

Productivity (measured by Gross Value Added [GVA] per worker) within the labour force in Bolsover currently stands at £30,715 per worker, which is lower than the Derbyshire (£35,966), regional (£39,035) and national (£45,608) equivalent.

As shown in Figure 3.5, GVA per worker remained below the regional and national average over the period 2000-2015. This could reflect the concentration of lower value employment within Bolsover and indicates scope to enhance the authority’s productivity levels and output in future.

Since 2000, however, GVA per worker in Bolsover has grown from £26,416 to £30,715 in 2015 (or +16.3%). This rate of growth falls behind Derbyshire (+36.9%) and regional growth (20.5%), but exceeds the national average rate of growth (13.3%) over the same period. As shown below, whilst the patterns of growth were relatively similar in Bolsover to the Derbyshire average during 2000-2004, Bolsover experienced lower rates of growth from 2007 onwards (Figure 3.5).
Figure 3.5 Average GVA per Worker and percentage change 2000-2015

Source: Experian 2015 / NLP analysis

Business Demography and Enterprise

3.20 Bolsover supports relatively low levels of business start-up, with just under 53 new business registrations per 10,000 working age population compared with 67 across Derbyshire, 76 in the East Midlands and 85 across the UK. This points towards limited levels of entrepreneurship in the local economy compared to other parts of the country.

3.21 Bolsover also has a slightly lower proportion of small firms employing between 0 and 9 workers (85.9%) than the East Midlands (87.7%) and the UK (88.3%). It accommodates a slightly higher proportion of large firms employing at least 50 workers (2.9%) compared with the East Midlands (0.4%) and the UK (2.1%).

3.22 Drawing on Inter-Departmental Business Register (IDBR) data, the spatial distribution of key business clusters within Bolsover can be identified and is presented in Figure 3.6. This underlines the presence of a diverse mix of business sectors within Bolsover, with the largest business concentrations located around Bolsover town centre, the M1 corridor, Shirebrook and – to a lesser extent – Creswell and Whitwell.

14 ONS, Business Demography Statistics (2013)
15 ONS, Inter Departmental Business Register (2014)
3.23 The map also shows that public services accounts for a high proportion of employment across each of the locations referenced above. Manufacturing, wholesale & retail is also distributed throughout the district, with the strongest clusters in Pinxton & South Normanton in the south and Shirebrook in the east of the district.

3.24 The smaller settlements of Newton & Tibshelf, Clowne & Barlborough and Creswell & Whitwell accommodate important clusters of firms including those operating within public services, construction, finance & insurance and wholesale & retail.

**Knowledge-Based Industries**

3.25 Knowledge-based industries are those sectors where value-added is derived from the accumulation of knowledge, often fostered through innovative activities and the increasing use of technology. Such sectors tend to have more growth potential and can signal an economy’s competitiveness.\(^{16}\)

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\(^{16}\) The UK Competitiveness Index does not seek to define the concept of knowledge-based industries on the basis of SIC codes or SOC groupings. The OECD definition of the knowledge economy is, however, adopted by many practitioners. Appendix 4 provides a summary of the SIC codes included within the OECD definition.
3.26 In 2008 (the latest data available\textsuperscript{17}), around 13.7% of businesses within Bolsover were classified as knowledge-based, which was lower than the regional (14.7%) and national (21.8%) averages.

3.27 In comparison to other areas within the sub-region, Bolsover also performs poorly, with the lowest proportion of knowledge-based businesses (Table 3.1). This suggests that the surrounding local authorities are perhaps better placed to create higher levels of growth than Bolsover.

Table 3.1 Share of Knowledge-Based Businesses, 2008

<table>
<thead>
<tr>
<th>Rank</th>
<th>Borough</th>
<th>Knowledge-Based Businesses (% of Total Businesses)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Derby</td>
<td>19.5</td>
</tr>
<tr>
<td>2</td>
<td>South Derbyshire</td>
<td>18.7</td>
</tr>
<tr>
<td>3</td>
<td>High Peak</td>
<td>17.9</td>
</tr>
<tr>
<td>4</td>
<td>Derbyshire Dales</td>
<td>17.6</td>
</tr>
<tr>
<td>5</td>
<td>Chesterfield</td>
<td>16.6</td>
</tr>
<tr>
<td>6</td>
<td>North East Derbyshire</td>
<td>16.4</td>
</tr>
<tr>
<td>7</td>
<td>Erewash</td>
<td>16.3</td>
</tr>
<tr>
<td>8</td>
<td>Amber Valley</td>
<td>15.5</td>
</tr>
<tr>
<td>9</td>
<td>Bolsover</td>
<td>13.7</td>
</tr>
</tbody>
</table>

Source: UK Competitiveness Index 2010 / NLP analysis

3.28 In the overall Competitiveness Index for 2013, Bolsover ranks 361\textsuperscript{st} out of 379 local authority areas in the UK. This indicates that Bolsover falls within the lowest 5% of competitive places in the UK based upon economic activity, business performance, skills and knowledge based industries.

Labour Market

3.29 The economic activity rate (i.e. the share of working-age residents either in or seeking employment) in Bolsover at 67.7% is significantly lower than the Derbyshire (79.3%), regional (78.0%) and national rate (77.3%).\textsuperscript{18} It is understood – based upon discussions with BDC officers – that this could, in part, reflect the fact that the District has a particularly high number of residents who are disabled or have a life limiting illness.

3.30 As shown in Figure 3.7, claimant unemployment levels rose significantly in Bolsover between 2007 and 2009 (reflecting the onset of the recession), with unemployment levels peaking at 4.3% in March 2009. Between 2009 and 2012, the level of JSA claimants remained relatively high, before consistently dropping again from March 2012 to reach a five year low of 1.6% in December 2014. The current claimant unemployment rate (1.7%) is comparable to the Derbyshire (1.5%), East Midlands (1.9%) and national average (2.0%).\textsuperscript{19}

\textsuperscript{17} Data is taken from the UK Competitiveness Index (2010). Whilst a 2013 version of the document has been published more recently, this does not include the underlying datasets which allow for a comparison of knowledge-based activity at the local authority level

\textsuperscript{18} ONS Annual Population Survey (September 2013- September 2014)

\textsuperscript{19} ONS claimant count (February 2015)
3.31 On the wider Annual Population Survey measure,\textsuperscript{20} Bolsover’s unemployment rate (5.4%) is higher than the Derbyshire average (4.8%), but comparable to the regional rate (5.7%) and lower than the UK average (6.4%).\textsuperscript{21}

3.32 The proportion of working age residents claiming Employment and Support Allowance (ESA) and incapacity benefits provides another indicator of labour market participation. In Bolsover this is equivalent to 16.2% of working age claimants, which exceeds the Derbyshire (12.1%), regional (12.2%) and national equivalent (12.7%).\textsuperscript{22}

3.33 In November 2012 (the latest available data\textsuperscript{23}), there were 2.6 claimant unemployed workers for every unfilled job centre vacancy in the local authority. This was higher than the ratio for Derbyshire (2.3), but lower than the ratio for the East Midlands (2.5) and Great Britain (3.4)\textsuperscript{24}; suggesting a limited amount of latent demand for jobs exists within the labour market.

3.34 This may in part explain the fact that resident wages in Bolsover (at £423 per week) are lower than the Derbyshire (£498), East Midlands (£483) and national average (£518). Those who work in Bolsover, however, earn slightly more than residents, with workplace wages (at £428 per week) around 1% higher than average resident wages (Figure 3.8). As with resident wages, however, the workplace wages recorded in Bolsover lag behind the corresponding figures for Derbyshire, East Midlands and the UK.

\textsuperscript{20} This records all those searching for work but who are currently unemployed regardless of whether they are claiming jobseekers allowance or not
\textsuperscript{21} ONS Annual Population Survey (September 2013 - September 2014)
\textsuperscript{22} DWP benefit claimants - working age client group (August 2014)
\textsuperscript{23} This data is no longer collated or published by ONS
\textsuperscript{24} DWP benefit claimants - working age client group (November 2012) / ONS vacancies (November 2012)
Bolsover is characterised as having relatively high levels of deprivation, with a ranking of 43rd out of 326 local authorities areas in the latest Indices of Multiple Deprivation (2010), placing the local authority in the most deprived 15% in England. However, this local authority-wide profile masks significant variation within Bolsover.

Figure 3.9 shows concentrations of worklessness across the local authority using Department for Work and Pensions (DWP) data on benefits claimed amongst working age residents. It identifies a number of wards in which worklessness is most pronounced, including Shirebrook and Bolsover North West.
Examining commuting flows can help to define the functional economic market area of an economy. These commuting flows can be assessed using the latest travel-to-work flow data from the 2011 Census.

In 2011, approximately 69.7% of Bolsover’s working residents travelled outside the local authority for employment. The authority’s self-containment rate (i.e. share of residents also working within Bolsover) was equivalent to just under 30%, having declined from 38.5% at the time of the previous Census in 2001. The worker outflow in 2011 equated to around 20,436, with the largest flows to Chesterfield (11%), Amber Valley (9%), Ashfield (8%) and Mansfield (7%).

It should be noted that a further 2,426 (8.3%) of Bolsover’s working residents were classified by the 2011 Census as having no fixed place of work. This group is likely to include sole traders and skilled trade workers who undertake their work at various sites on a job-by-job basis. It is anticipated that many of these residents will also largely work within the local authority, suggesting that Bolsover’s self-containment rate is likely to be higher than 30% in reality.

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3.37 CLG, Functional Economic Market Areas: An Economic Note, 2010
3.40 At the same time, around 15,324 workers commuted into Bolsover for work in 2011, primarily coming from the adjoining authorities of Mansfield (9%), Ashfield (9%), Chesterfield, Amber Valley and North East Derbyshire (all 7%) (Figure 2.9).

3.41 On this basis, Bolsover is a net exporter of labour, with a net outflow of around 5,112 workers, equivalent to around 17% of all working residents within the local authority.\(^{26}\)

Figure 3.10 Travel-to-Work Flows for Bolsover, 2011

Source: Census 2011 / NLP analysis

3.42 The ONS defines labour market areas as those areas in which the bulk of the resident population also work within the same area. Defining labour market areas requires an analysis of commuting patterns to identify Travel to Work Areas (TTWAs) for local economies. The current criteria for defining TTWAs is that generally at least 75% of an area’s resident workforce work in the area and at least 75% of the people who work in the area also live in the area. The area must also have a working population of at least 3,500.

3.43 Applying this methodology to the 2011 Census, it is possible to define Bolsover’s TTWA as Bolsover, in combination with adjoining local authorities in:

- Derbyshire: Chesterfield, North East Derbyshire and Amber Valley; and
- Nottinghamshire: Bassetlaw, Mansfield and Ashfield.

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\(^{26}\) Census (2011)
Together, these authorities comprise the workplace for 80% of Bolsover’s resident working population and the residence for 76% of Bolsover’s workers.

On the basis of an analysis of travel-to-work data, therefore, and having regard to the ONS methodology for defining labour market areas, Bolsover’s FEMA would appear to take in parts of the local authorities of: Chesterfield; North East Derbyshire; Amber Valley; Bassetlaw; Mansfield; and Ashfield. From a commercial property market perspective, however, the District’s FEMA would appear to be much more tightly defined. This is considered in paragraphs 12.6 to 12.10.

Between 2001 and 2011, the net inflow of workers from Bolsover decreased slightly as the number of out-commuting resident workers increased at a higher rate than the number of workers commuting out the local authority. This is reflected by a lower self-containment rate in 2011 (30.3%) than in 2001 (38.5%) (Table 3.2).

Table 3.2 Changes in Travel-to-Work Flows in Bolsover, 2001 - 2011

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Out-Commuting Working Residents</td>
<td>10,490</td>
<td>20,436</td>
<td>+ 9,946</td>
</tr>
<tr>
<td>In-Commuting Workers</td>
<td>18,017</td>
<td>15,324</td>
<td>- 2,693</td>
</tr>
<tr>
<td><strong>Net In-Commuting Flow</strong></td>
<td><strong>7,527</strong></td>
<td><strong>-5,112</strong></td>
<td><strong>+ 7,253</strong></td>
</tr>
<tr>
<td>Self-Containment Rate</td>
<td>38.5%</td>
<td>30.3%</td>
<td>- 8.2%</td>
</tr>
</tbody>
</table>

Source: Census 2001 & 2011 / NLP analysis
Note: Differences in the way that the two sets of Census data (2001 and 2011) record ‘no fixed place of work’ means that the two data sets are not directly comparable.

Growth in the number of working residents travelling out of the local economy to find suitable employment could reflect a mismatch in terms of the skills levels associated with in and out commuters. Analysis of commuting flows for Bolsover in 2001 indicates that in-commuters are more likely to be employed within lower managerial and professional occupations, lower supervisory and technical occupations, or higher managerial occupations than workers living in Bolsover (Figure 3.11).

Conversely, out-commuters tend to be employed within lower managerial and professional occupations, semi-routine occupations and intermediate occupations. Residents that both live and work in Bolsover are most likely to be employed in routine occupations, semi-routine occupations, or for small employers/own accounts (Figure 3.11).

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27 Occupation group data for commuting flows has not yet been released for the 2011 Census.
Conclusions

Bolsover has recorded strong employment growth over the period from 1991 to 2015, with 14,600 new jobs delivered. B class job growth over the same period has also been strong (6,610). However, it is noted that B class growth was driven primarily by the period 2000 to 2008, with far more modest rates of change observed before and after.

B class job growth was driven primarily by increases in office-based employment, with the sector accounting for 4,220 additional jobs. A detailed interrogation of the data raises some concerns that the figures may overstate the scale of office-based growth observed in the District.

Strong employment growth was also observed in relation to the warehousing and distribution sector, with a far more modest increase observed in manufacturing.

Workforce job growth has historically exceeded working-age population growth in Bolsover, in contrast with a number of local authorities within the sub-region.

The business base in Bolsover accommodates a slightly lower share of smaller firms and a higher share of larger firms compared with regional and national averages. It is also characterised by relatively low levels of business start-up.

The largest concentrations of businesses are located around Bolsover town centre, the M1 corridor, Shirebrook and – to a lesser extent – Creswell and Whitwell. The smaller settlements including Newton, Tibshelf, Clowne and Barlborough also play an important role in accommodating firms and jobs.

Bolsover is characterised by an uneven set of labour market indicators including high levels of jobs growth, but relatively low economic activity rates
and generally high levels of deprivation. Both workplace and resident wages are lower than the averages recorded across Derbyshire, East Midlands and the UK.

Bolsover is a net exporter of labour, with a net outflow in the order of 5,112 according to the 2011 Census. Over the last ten years, the Borough’s self-containment rate has reduced by 8.2%, despite high levels of jobs growth. Census data, however, points to a slight skills mismatch between in- and out-commuters, with out-commuters more likely to be employed within lower skilled occupations than those travelling into Bolsover for work.
Overview of B-Use Employment Space

4.1 This section provides an overview of the current stock of B Class employment space in Bolsover, whilst also summarising recent trends and changes to the supply of this employment space. The analysis is presented in respect of the three main B class uses (i.e. offices [B1a/b], manufacturing [B1c/B2] and warehousing and distribution [B8]) where the data permits. In some instances, however, B1c/B2 and B8 data has been aggregated at the source to comprise of ‘industrial’ space.

The analysis presented draws upon the following sources:

- Commercial floorspace data from the ONS and various datasets from the Valuation Office Agency (VOA); and
- Monitoring data on commercial space from BDC.

Current Stock of Employment Space

4.3 In 2012 (the latest comprehensive dataset available) Bolsover contained 810,000sq.m. A breakdown of the total employment floorspace by type is provided in Figure 4.1. This includes a comparison with employment space recorded in the local authorities that surround Bolsover District.

![Figure 4.1 Commercial floorspace in Bolsover and surrounding areas (2012)](source: VOA / NLP analysis)

4.4 From this, it can be seen that the supply of employment space within Bolsover is dominated by industrial space, which accounts for 747,000sq.m – equivalent to 92% of the District’s total stock. Offices account for the remaining 8% of B class floorspace – a total of 63,000sq.m.
4.5 The balance between office and industrial stock observed in Bolsover is not untypical of many of the surrounding authorities. Indeed, it is only in Sheffield, Chesterfield and Mansfield that offices account for more than 10% of stock. However, it can be seen from the graph that the overall level of B class provision in the District is relatively modest, with only Mansfield and North East Derbyshire containing less floorspace. In respect of office space, Bolsover contains the second lowest level of provision (ahead of North East Derbyshire) demonstrating a low level of supply and suggesting that the District is not perceived as a strong office location within the FEMA context.

**Growth in Stock of Employment Space**

4.6 Between 2000 and 2012, the total stock of B class floorspace increased by 268,000sq.m (equivalent to growth of 49%). This rate of growth is considerably higher than that observed at the national (0.8%) and regional (6.6%) level. In addition, it is more than double the rate of increase experienced by any of the adjoining local authorities (other than Ashfield, where an uplift of 31% was observed over the period).

**Figure 4.2 Change in floorspace 2002-2012**

Source: VOA / NLP analysis

4.7 In addition, the absolute change in floorspace in Bolsover between 2000 and 2012 was greater than that experienced by many of the surrounding authorities. Only Ashfield (303,000sq.m) and Rotherham (438,000sq.m) experienced a larger net increase during this period.

4.8 The increase in floorspace within the District was driven primarily by the provision of new industrial stock. Between 2000 and 2012, the total stock of industrial floorspace in Bolsover rose by 224,000sq.m (43%) - outperforming England (-3%) the East Midlands (5%) and all of the surrounding authorities in
proportionate terms. Ashfield (236,000sq.m) and Rotherham (386,000sq.m) were the only surrounding authorities to record stronger growth in absolute terms.

4.9 Notwithstanding the above, the Bolsover office market also performed strongly during this period. Total office floorspace increased from 19,000 to 63,000, representing growth of 44,000sq.m (232%) although this was achieved from a very low base position.

4.10 In proportionate terms, the rate of increase observed in the District was significantly higher than the corresponding figures for England (16%), the East Midlands (25%) and most of the surrounding authorities (with the exception of Ashfield with a growth rate of 191%). Analysing the absolute change in office floorspace shows that the performance of Bolsover lagged behind the surrounding authorities of Rotherham (52,000sq.m), Ashfield (67,000sq.m) and – in particular – Sheffield (262,000sq.m).

Figure 4.3 Change in Office and Industrial Floorspace in Bolsover 2000-2012

Source: VOA / NLP analysis

Spatial Distribution

Both Figure 4.4 and Table 4.1 provide an overview – underpinned by the latest available VOA data – of the spatial distribution of B class floorspace across Bolsover.

The geography of the District’s commercial markets is considered in greater detail in Section 5.0 of this report. In summary, however, the market for industrial land and premises is characterised by a distinct east-west split. The profile of and demand for space in the west of the Bolsover is considered to be far stronger. Locations in the west have been successful in attracting a
In contrast, the east of the district is largely characterised by a series of much more localised sub-markets that typically cater for indigenous demand from within the surrounding area. The notable exception to this is Brook Park in Shirebrook, which has been successful in attracting larger, more footloose occupiers. This is considered in greater detail elsewhere in the EDNA but is understood to be atypical of the overall pattern of demand across the District.

Discussions with agents and stakeholders typically focused on the Bolsover office market as a single entity, albeit with individual settlements serving local demand from the surrounding area. In general, the office market was regarded as weak, with demand coming almost exclusively from local firms that particularly want to be located in Bolsover, or who are particularly cost sensitive, searching out accommodation in the District.

Figure 4.4 Spatial Distribution of B Class Floorspace in Bolsover

It can be seen that the largest stock of space is to be found in the south of the District in close proximity to the M1. Indeed, 424,500 sq.m of floorspace (50% of the District total) is clustered in the Pinxton and South Normanton area.
Whilst the area contains the second largest supply of office space (18,200sq.m), the focus is very much on industrial space. Indeed, factories, workshops and warehouses account for 96% of all B class stock in the area, underpinned by locations such as High View Road, Berristow Lane and Clover Nook Industrial Estates, South Normanton and the Brookhill Industrial Estate, Pinxton. The analysis also identifies the importance of Shirebrook within the local commercial market. The area contains 170,600sq.m of floorspace (20% of the District total) on locations such as Brook Park. As observed in relation to Pinxton and South Normanton, provision in Shirebrook is dominated by industrial stock (99% of all B class space), albeit with a far stronger emphasis on warehousing (80% of all B class space).

In relation to the local office market, the analysis highlights the importance of Clowne and Barlborough – in the north west of the District – as the key focus of provision. Indeed, 29,300sq.m of office floorspace is concentrated within the area (45% of all office space in Bolsover) included significant provision on developments such as Barlborough Links.

### Table 4.1 Distribution of Employment Floorspace by Type and Location

<table>
<thead>
<tr>
<th>Location</th>
<th>Office Floorspace</th>
<th>Factory Floorspace</th>
<th>Workshop Floorspace</th>
<th>Warehouse Floorspace</th>
<th>Total B Class Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pinxton &amp; S.Normanton</td>
<td>18,200sq.m</td>
<td>160,000sq.m</td>
<td>30,900sq.m</td>
<td>215,500sq.m</td>
<td>424,500sq.m</td>
</tr>
<tr>
<td>Shirebrook</td>
<td>2,500sq.m</td>
<td>21,100sq.m</td>
<td>12,000sq.m</td>
<td>135,000sq.m</td>
<td>170,600sq.m</td>
</tr>
<tr>
<td>Clowne &amp; Barlborough</td>
<td>29,300sq.m</td>
<td>17,600sq.m</td>
<td>8,400sq.m</td>
<td>58,600sq.m</td>
<td>113,900sq.m</td>
</tr>
<tr>
<td>Newton &amp; Tibshelf</td>
<td>400sq.m</td>
<td>31,600sq.m</td>
<td>5,400sq.m</td>
<td>2,100sq.m</td>
<td>39,500sq.m</td>
</tr>
<tr>
<td>Bolsover</td>
<td>8,100sq.m</td>
<td>100sq.m</td>
<td>13,100sq.m</td>
<td>2,400sq.m</td>
<td>23,800sq.m</td>
</tr>
<tr>
<td>Creswell &amp; Whitwell</td>
<td>1,200sq.m</td>
<td>2,900sq.m</td>
<td>12,200sq.m</td>
<td>600sq.m</td>
<td>16,900sq.m</td>
</tr>
<tr>
<td>Rest of District</td>
<td>5,900sq.m</td>
<td>7,600sq.m</td>
<td>29,200sq.m</td>
<td>14,700sq.m</td>
<td>57,400sq.m</td>
</tr>
</tbody>
</table>

Source: VOA (2015) / NLP analysis

## Development Rates

### Gross Completions

The gross amount of land developed for B class employment uses in Bolsover over the period 1999/00 to 2014/15 (inclusive) in shown in Figure 4.5. This shows that 115.14ha of gross B class land was developed within the District over the 16 year period, equivalent to an average take-up rate of 7.20ha per annum. Most of the new space delivered (83%) has been for industrial uses, with a comparatively modest provision of office space, as summarised below:
- B8: total take-up of 68.60ha (equivalent to 4.29ha per annum);
- B1c/B2: total take-up of 26.86ha (equivalent to 1.68ha per annum); and
- B1a/b: total take-up of 19.69ha (equivalent to 1.23ha per annum)

Figure 4.5  Gross Take-Up of Employment Land (1999-2000 to 2014-15)

4.18 As shown in Figure 4.5, the annual level of employment land delivered in the District was relatively uneven during the period, fluctuating between a low of 0.00ha and a high of 25.62ha. The reporting years of 2004/05 (25.62ha) and 2012/13 (20.19ha) stand out as years during which particularly high levels of activity were observed. Indeed, those two particular years account for 40% of all take-up observed over the 16 year period.

4.19 The ‘spike’ in gross completions observed in 2004/05 was driven by two large retail distribution developments: a 12.4ha site taken by Tesco on Barlborough Links; and a 9.8ha site taken by Sports Direct on Brook Park. Similarly, the ‘spike’ in activity observed in 2012/13 was underpinned by Co-op taking 17.73ha of retail distribution space at Junction 28, Castlewood.

4.20 An analysis of headline take-up figures over the 16 year period (7.20ha per annum) and the last five years (6.83ha per annum) would appear to suggest that development activity has held up well in Bolsover in recent years. Interestingly, though it can be seen that the sectoral composition of activity has shifted markedly, with B8 warehousing and distribution premises increasing in prominence and the delivery of B1a/b offices and B1c/B2 factory premises having slowed markedly since the onset of the recession. Indeed, average take-up rates for the last five years read as follows:
- B8: 6.23ha per annum;
- B1a/b: 0.41ha per annum; and
- B1c/B2: 0.18ha per annum.
Net Completions

4.21 A total of 15.43ha of employment land was lost to non-B class uses across Bolsover over the period 1999/00 to 2014/15. As a consequence, the net delivery of B class employment land over this timeframe is estimated to correspond to 99.71ha or 6.23ha per annum.

Figure 4.6 Net Take-Up of Employment Land (1999-2000 to 2014-2015)

Source: Bolsover DC Monitoring Data / NLP analysis

4.22 It can be seen from Figure 4.6, however, that a net loss of employment land was recorded in years 2002/03, 2009/10 and 2010/11, with losses to no-B class uses exceeding the level of new B class space provided in the District.

4.23 A review of the Council’s monitoring data indicates that 9.29ha (60%) of the land lost over the 16 year period was previously classified as land for manufacturing (B1c/B2) uses. Losses of office (B1a/b) and warehousing/distribution (B8) land were considerably lower at 1.15ha and 1.24ha respectively, whilst a further 3.75ha of land previously allocated for general B class employment uses (B1/B2/B8) was also lost.

4.24 A more detailed analysis of the data captured by BDC in relation to losses shows that 8.87ha of the land has been developed to provide space for a range of employment generating uses that fall outwith the B classes. This includes uses such as: retail, leisure, café/restaurants and training facilities. In addition, 6.56ha of land has been lost to residential development.

Emerging Supply of Employment Space

4.25 The supply of employment space in the development pipeline comprises of:

- Undeveloped employment allocations (as identified in the Bolsover District Local Plan); and
• Sites with an extant planning permission for B class development.

4.26 Based upon information provided to NLP by Bolsover DC, as well as the site assessments undertaken, it is estimated that the District’s pipeline supply currently comprises of just under 105ha of land in gross terms. The composition of the supply is summarised in Table 4.2.

Table 4.2 Available Supply of Employment Space in Bolsover

<table>
<thead>
<tr>
<th>Allocation (ha)</th>
<th>Extant Permissions (ha)</th>
<th>Total Supply (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pinxton &amp; South Normanton</td>
<td>5.45</td>
<td>10.68</td>
</tr>
<tr>
<td>Shirebrook</td>
<td>5.56</td>
<td>9.87</td>
</tr>
<tr>
<td>Creswell &amp; Whitwell</td>
<td>11.25</td>
<td>-</td>
</tr>
<tr>
<td>Bolsover</td>
<td>4.07</td>
<td>26.73</td>
</tr>
<tr>
<td>Barlborough</td>
<td>0.42</td>
<td>5.94</td>
</tr>
<tr>
<td>Rest of District</td>
<td>2.47</td>
<td>22.25</td>
</tr>
<tr>
<td>Total</td>
<td>29.22</td>
<td>75.47</td>
</tr>
</tbody>
</table>

Source: Bolsover DC / NLP analysis

4.27 From the table, it can be seen that Bolsover contains the largest level of pipeline supply, due to the recent granting of outline consent for 31ha of land for employment uses at Coalite (including 26.73ha for B class development[29]). Significant levels of pipeline supply can also be observed in Pinxton and South Normanton (including 10.68ha of land with extant permission at Castlewood Business Park (North)) and Shirebrook (including 7.60ha of land with extant permission at Brook Park). Large sites with extant permission are also situated within the ‘rest of the District’ notably 12.2ha at Markham Vale (Land at Seymour) and 10.05ha on the former Armstrong Colliery in Steetly.

Changing Employment Space Requirements

4.28 Given that this study assesses Bolsover’s business needs over the period to 2033, it is relevant to consider some of the key drivers and macro trends that are likely to influence the type, scale and locational requirements for employment space in the District in the longer term. Clearly, it is not possible to predict at present precisely how these emerging trends will manifest and the

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[28] This comprises of 27.1ha of allocated land assessed as part of the EDNA, as well as a further 4 sites (totalling 2.12ha) which were not put forward for assessment by BDC.

[29] In August 2015, the Council resolved to grant planning permission subject to agreeing conditions for development on 31ha of land at Coalite (to include 26.73ha for B2/B8 uses), 0.33ha for a museum/visitor centre, 0.58ha for an Energy/CHP centre and 3.36ha for a transport hub.
impact that they will have upon the need for space in Bolsover. As such, it will be important to closely monitor their implications within the context of the District’s evolving portfolio of land for B class uses.

4.29 The trends considered in the following paragraphs primarily relate to office occupier requirements. This is – in part – a reflection of the fact that, aside from the use of increasingly advanced technologies, the nature of industrial activity in future is not expected to drive any significant change in spatial requirements for workspace over time.

Space-Less Growth

4.30 At the national level, long-term trends show the growth in the number of office workers outpacing the growth of office floorspace, particularly over the past decade. As a result, it would appear that office employment densities have, as a general rule, declined – resulting in less floorspace per employee. This reflects the increased prominence of flexible working practices, such as ‘hot-desking’ and homeworking, as well as technological changes (for instance, devices such as computers having reduce in size) with the latter making it possible for work spaces to become smaller and more compact.

Technology

4.31 The way in which firms and employees interact with one another is evolving in response to the development of increasingly sophisticated technology, reducing the need for a fixed workplace. For instance, mobile and wireless technology allows information to be accessed almost anywhere from a single platform, whilst video conferencing can reduce the need for face-to-face interaction in some situations. The traditional ‘desk’ can now be situated almost anywhere, be it inside a building, in a café, on the move, or in a public open space. Furthermore, cloud computing enables IT services to be piped into an office building through the internet – via specialist data centres – thereby reducing the space required to accommodate a building’s IT infrastructure.

Increasing Self-Employment

4.32 Self-employment is at its highest level for 40 years – currently standing at 4.6 million people or 15% of the UK workforce – according to data from the ONS. Since 2008 there has been a significant growth in self-employment, with two-thirds of all employment growth attributed to this group.

4.33 Whilst the most common jobs for the self-employed are in construction, taxi driving and carpentry, in recent years there has also been significant growth amongst industries such as management consultancy, information technology and chartered accountants – professions that typically generate a requirement for office space.

4.34 In some instances, a move into self-employment has been driven by a lack of formal employment opportunities particularly during the economic downturn.
As the economic recovery continues and the labour market responds, it remains to be seen whether rates of self-employment will decline as individuals move back into more traditional forms of paid employment. Alternatively, should the rise of self-employment continue to gather pace, this could have implications for long term employment space needs. At present, self-employed workers typically either work from home (see below) or seek more formal, small-scale workspace provision – for example, with access to shared facilities and opportunities to collaborate with other like-minded entrepreneurs.

**Homeworking**

4.35 An improvement in broadband connectivity, combined with an increased tolerance of remote working amongst employers, has led to a rise in the levels of home working in the UK. According to the latest data from ONS, there are 4.2 million homeworkers in the UK – equivalent to 13.9% of the total workforce. Businesses are increasingly adapting their practices and protocols in order to accommodate the changing requirements of modern workers – many of whom need to balance flexible working hours with family commitments.

4.36 Changing attitudes towards homeworking are already having an impact upon space requirements in some sectors. In some companies, for instance, increased levels of remote working have reduced the proportion of permanent of formal desk space required, alongside the introduction of ‘hot-desking’ or hoteling systems, in the office.

**Employment Space in Adjoining Areas**

4.37 It is also important to understand the balance between the supply of, and demand for employment land in those authorities located adjacent to Bolsover. In addition to the quantitative balance of supply and demand, it is also helpful to understand more qualitative issues, such as the extent and types of available employment land and any major new developments which could compete with Bolsover in the future. These issues are considered in Figure 5.1 and the accompanying paragraphs set out below.
Figure 4.7  Employment Land Supply (ha)

Source:  Annual Monitoring Reports, Various 2011-2015

4.38  Figure 5.1 indicates that Bolsover has a similar level of available employment land to Ashfield and Amber Valley, but double that of employment land availability in Mansfield and North East Derbyshire. Rotherham has a considerably higher amount of available employment land than the other surrounding authorities, reflecting its larger population.

4.39  Further information in respect of employment land in the neighbouring local authorities is summarised below.

Rotherham

4.40  Rotherham is located to the north of Bolsover in Yorkshire and is included within the Sheffield City Region LEP area. Employment land is concentrated around the M1 corridor, the Advanced Manufacturing Park in Waverley and Rotherham town centre.

4.41  The M1 motorway provides a good base for manufacturing and distribution firms in Rotherham which dominate the market. The 2010 Rotherham Employment Land Review identifies a modest demand for office space locally – reflecting strong competition from larger centres nearby.30

4.42  Key sectors outlined as offering the strongest growth potential in Rotherham include:

- Advanced Manufacturing;
- Business Process Services; and
- Food service activities.

4.43  A new Employment Land Review for Rotherham is currently underway. The Core Strategy highlights the need to allocate 230 hectares of land for business and industrial development and 5 hectares of land for office floorspace for the

period 2013 to 2028, however, it is not yet clear how this relates to anticipated future demand emerging through the new ELR, and therefore the potential impact on Bolsover.

**Mansfield**

Mansfield is located to the east of Bolsover in Nottinghamshire and is included within the D2N2 LEP area. Employment land in Mansfield is concentrated in Mansfield town centre and around the A167 Mansfield/Ashfield Regeneration Route (MARR).

4.44 Like the other local authorities in Nottinghamshire, Mansfield’s economy is undergoing radical structural change, with the decline of coal mining and textile industries. Investment in the town centre and major investment in transport infrastructure around the periphery of Mansfield town has helped to diversify the economy, with a growth in business services and manufacturing.

4.45 In order to drive further growth, Mansfield and Ashfield’s Joint Economic Master plan\(^{31}\) identifies five key sectors with the strongest potential to grow, including:

- Health;
- Business Services;
- Transport and Logistics;
- Wholesale; and
- Manufacturing and Transport Equipment.

4.46 The 2015 Employment Monitoring Report demonstrates an available supply of 52.23ha\(^{32}\); however, take up over the period 2011-2015 has been relatively low, averaging 0.4ha per annum.

4.47 The Nottingham Core HMA and Nottingham Outer HMA: Employment Land Forecasting Study (2015) recommends the need for between 39.74 - 50.55ha of B Class employment land in Mansfield between 2011-2033, indicating that Mansfield has a sufficient allocation of sites to meet demand. On this basis, Mansfield is, therefore, unlikely to excerpt significant influence on demand for the land in the study area.

**Ashfield**

4.48 Ashfield borders Mansfield and forms part of the D2N2 LEP. Employment land in Ashfield is concentrated in the settlements of Hucknall, Sutton-in-Ashfield and Kirkby-in-Ashfield, as well as sites in Selston, Jacksdale and Underwood.

\(^{31}\) Mansfield and Ashfield District Councils, (2011), Mansfield and Ashfield’s Joint Economic Master plan 2011-2021

\(^{32}\) Mansfield Employment Monitoring Report 2015
4.49 The Joint Economic Masterplan for Mansfield and Ashfield acknowledges that the local authorities comprise a single local economic area. Key growth sectors are therefore the same across both areas, with key strengths in Ashfield identified as freight transport by road, storage/warehousing and aerospace manufacturing.

4.50 The 2014 Employment Monitoring Report demonstrates an available supply of 108.96ha\textsuperscript{33} of B class employment land; however, a large proportion of this supply is allocated for a 27ha mixed use employment and residential scheme at the Rolls Royce site, Hucknall. This scheme aims to create 2,000 new high tech and engineering jobs.

4.51 The Nottingham Core HMA and Nottingham Outer HMA: Employment Land Forecasting Study (2015) recommends the need for between 47.81 and 132.13ha of B Class employment land between 2011-2033. This indicates that Ashfield has a potential under supply of land, if future development rates match past completion rates, potentially exerting additional pressures on employment sites within Bolsover.

\textbf{Amber Valley}

4.52 Amber Valley is a borough of Derbyshire, included within the D2N2 LEP area. The semi-rural area includes a number of small towns, with employment land concentrated in around Alfreton and the A38.

4.53 The economy of the Amber Valley was formerly based on coal mining and engineering, but has experienced economic difficulties following the decline of these traditional industries. The borough, however, benefits from having good transport connections to other parts of the country, and as such, has proven an attractive location for commuters. This has led to former employment sites being redeveloped for housing, resulting in high levels of out-commuting from the Amber Valley.

4.54 The 2011 Annual Monitoring Report (latest available), indicates a supply of 93.37 ha of land available for B class employment development. The 2013 update of the Derbyshire Employment Land Review\textsuperscript{34} concluded that between 2008 and 2028, a minimum of 75 hectares of business and industrial land should be provided in Amber Valley. In quantitative terms, therefore, Amber Valley appears to have a sufficient supply to meet future requirements. The Review also highlighted, however, that a high number of the current sites are of poor quality, indicating a need to review current site allocations.

4.55 In the event that a sufficient quantity of high quality sites is not identified, this could result in demand for space being exported to the surrounding authorities, with the leakage of workers outside of the borough also likely to persist. Such a scenario could excerpt additional pressure on employment sites within Bolsover.

\textsuperscript{33} Ashfield Employment Monitoring Report 2014
\textsuperscript{34} GL Hearn, (2013), Derby HMA Employment Land Review: Forecasts Update
Bassetlaw

Bassetlaw is located in Nottinghamshire and is included within both the Sheffield City Region LEP and the D2N2 LEP. Employment land is spread out across the District with a large cluster in and around Worksop and smaller clusters around Retford and Harworth.

With links to the A1 and A1(M), Bassetlaw’s economy is focussed on the logistics and manufacturing sectors. The Robin Hood Airport Growth Zone to the north of the District is also identified within the East Midlands Northern Sub-Region Employment Land Review as a long term economic growth opportunity for Bassetlaw.

In order to support future growth, the Bassetlaw Regeneration & Growth Strategy\(^\text{35}\) identifies opportunities in the following sectors:

- Agriculture/ food:
- Professional and business support services;
- The environmental and renewable sectors; and
- Tourism.

In 2013/14, Bassetlaw’s supply of employment land was estimated at 89.25ha. The East Midlands Northern Sub-Region Employment Land Review indicated that this level of supply will be insufficient to cater for growth - given that past take up rates in Bassetlaw are the highest in the Sub-Region.\(^\text{36}\) If unresolved, unmet demand in Bassetlaw has the potential to exert additional pressures on employment sites within adjacent local authorities, including Bolsover.

North East Derbyshire

North East Derbyshire is located in the East Midlands and is included within both the Sheffield City Region LEP and the D2N2 LEP. Employment land is concentrated in Clay Cross in the south of the district and Eckington and Killamarsh to the north.

North East Derbyshire’s traditional reliance upon coal, steel and heavy engineering industry has resulted in concentrations of high unemployment compared to the rest of the region. The East Midlands ELR also indicates that North East Derbyshire has the lowest rates of take-up across the sub-region, in part due to poor access to the M1 for some sites. However, following substantial public sector investment, this area is now becoming more established, with the south eastern areas of the District are beginning to be viewed in the sub-regional context, as major locations for new investment.\(^\text{37}\)

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\(^\text{35}\) Bassetlaw District Council, (2014), Regeneration & Growth Strategy 2014-2028
\(^\text{36}\) East Midlands Northern Sub-Region, (2008), The Northern Sub Region Employment Land Review
\(^\text{37}\) Nottinghamshire County Council and Partners, (2008), East Midlands Northern Sub-Region Employment Land Review
4.62 Target growth sectors identified within the North East Derbyshire Employment & Economy Topic Paper38 include:

- Advanced manufacturing: capitalising on existing strengths in the manufacturing sector and access to the strategic highways network; and
- Digital/creative sector: considered to provide opportunity to diversify and grow.

4.63 The Employment Sites Review (2014)39 suggests planning for a demand of 50 ha to 2031. The Review also identifies c.50ha of land classified as “attractive sites to the market with limited constraints to employment development”, plus additional land that is less attractive/more constrained. On this basis, demand and supply appear to be broadly in alignment. North East Derbyshire is, therefore, not anticipated to draw demand from, or import demand to Bolsover to any significant extent.

Chesterfield

4.64 Chesterfield is located in Derbyshire and is included within both the Sheffield City Region LEP and the D2N2 LEP. Employment land is concentrated around the market town of Chesterfield, with a number of established business parks surrounding the A61.

4.65 Chesterfield is the largest established office location in the East Midlands Northern Sub-Region, and has accommodated considerable B1-type growth in recent years. The recent growth of service based sectors, coupled with a degree of diversification in the manufacturing base, has helped to compensate for the loss of traditional employment in Chesterfield Borough, supported by the construction of a range of industrial and office premises, including several successful Innovation Centres on Council-owned land.40

4.66 Key sectors being targeted by the Local Planning Authority to help deliver future growth41 include:

- Manufacturing, Distribution and Transport: anticipated to generate new jobs related to developments at Markham Vale;
- Financial and Business Services: identified as a key growth sector nationally and supported by recent local growth in Chesterfield;
- Public Admin/Health/Education: key opportunities linked to the delivery of services to an ageing population; and
- Other Business Services: including professional organisations and the cultural industries.

4.67 The 2011 Employment Land Topic Paper42 highlights that annual take-up of employment land in Chesterfield has averaged 3.76 ha over the past 19 years.

39 North East Derbyshire District Council, (2014), Derbyshire Employment Sites Review
40 Nottinghamshire County Council and Partners, (2008), East Midlands Northern Sub-Region Employment Land Review
41 Chesterfield Borough Council, Economic Development Strategy
The report sets out a projected requirement of 79 ha to 2031, indicating that there is a sufficient supply of land identified as available, suitable and achievable for B class development. As a result, demand and supply appear to be broadly aligned, however, developments at Markham Vale could present strong competition for industrial users. A continued trend of office users focussing in larger centres such as Chesterfield, could also present strong competition for Bolsover.

Conclusions

4.68
The provision of employment space in Bolsover – whilst modest in comparison with many of the adjoining authorities – is dominated by industrial (factory and warehousing) uses. Accounting for 92% of total floorspace, industrial uses are particularly prevalent in the Pinxton and South Normanton area, as well as (to a lesser extent) Shirebrook.

4.69
The proportion of floorspace accounted for by office premises in Bolsover is not untypical of many of the surrounding areas. However, the overall scale of provision (in absolute terms) is low – standing at just 63,000sq.m in 2012. The stock of office space in the District is largely concentrated in Clowne and Barlborough, as well as Pinxton and South Normanton.

4.70
Strong growth in the provision of employment floorspace was observed in Bolsover over the period 2000-2012, with the supply increasing by 268,000sq.m or 49%. This rate of increase was substantially higher than that observed in any of the adjoining authorities and was driven primarily by the delivery of industrial space.

4.71
An analysis of Bolsover’s development pipeline reveals that 75.47 ha of undeveloped land currently benefits from planning permission for B class employment uses.

5.0 Commercial Property Market Signals and Intelligence

5.1 This section provides an overview of the commercial property market in Bolsover, including recent trends in demand and supply, as well as a consideration of the various market segments driving demand for different types of employment land. The findings are mainly based on discussions with a number of commercial property agents who are currently active in the District. Information has also been derived from other sources including commercial property availability databases and published reports.

UK Commercial Property Market Overview

5.2 The UK economic recovery, which began in 2013, has now become firmly established and sentiment in commercial property appears to be the most positive it has been for many years. Improvements in market conditions have been supported by the greater availability of real estate debt and equity finance. Occupier demand is getting stronger in a number of sectors and rent and capital values are generally stable or increasing.

5.3 Whilst central London offices are still the strongest performing market segment, there is an excess of demand for investment and development opportunities relative to their supply in the capital, which is prompting many investors and developers to look further afield in an attempt to secure stock and achieve good returns. Much of this activity, however, remains focused on the best performing locations in the South East or major provincial cities. In other locations, there is still weaker confidence and lenders and developers are likely to remain cautious.

Market Geography

5.4 The District of Bolsover is located in North East Derbyshire between Sherwood Forest to its East and the Peak District National Park to its West. Much of its landscape is in agricultural use. Its principal settlements are the market towns of Bolsover, Clowne, Shirebrook and South Normanton. Large areas of the District were heavily mined for coal in the Nineteenth and Twentieth Centuries, which led to the expansion of many of the settlements in those areas. In line with other coal producing areas, mining activity and employment collapsed at the end of the twentieth century.

5.5 The western part of the District has excellent road communications with the M1 motorway running North-South through the area from Woodall above Junction 30 to the River Erewash south of Junction 28. It also has the A38 trunk road from the West Midlands junction with the M1 at Junction 28. The East of the District includes the A60 running North – South and is close to the A1.
The district is neighboured by larger economic centres to all sides. To the North, Worksop and Sheffield; to the East, Retford; to the South, Mansfield, Nottingham and Derby; and to the West, Chesterfield. The combination of the presence of these bigger neighbour settlements and the good road network in much of the District has different impacts on the District, and these shape the nature and potential of its commercial property demand and supply.

Over the last 20 years, the warehouse and industrial sector has been dominated by the delivery of buildings on sites at or very close to the motorway junctions. Examples in this regard include schemes at Barlborough Links (J30) and Castlwood (J28). The delivery of the 45ha Brook Park development in Shirebrook in the East of the district has been a notable exception to an otherwise firmly established pattern.

The office market, meanwhile, has traditionally been more focused in the town centres, with a limited amount of out of town office space delivered in the last development cycle.

### Relationship with Surrounding Commercial Markets

It is helpful to consider Bolsover’s commercial property markets within the wider context of neighbouring markets, and the role Bolsover can play as part of the overall commercial property supply spectrum.

For office properties, the consensus view from the agents consulted was that occupiers tend to be drawn to the larger, established office centres in the bigger towns that surround Bolsover and are within commutable distances. These are primarily: Sheffield and Chesterfield, Worksop and Retford, Mansfield, Nottingham and Derby. These centres have a healthy supply of office space and in Sheffield, in particular, the supply of new office space ran ahead of demand for several years and there remains a significant level of vacant stock. The trend towards take up of offices in the surrounding larger centres is considered to be firmly entrenched so it is thought unlikely that Bolsover would be able to deliver large scale new office development.

There is, however, firm demand for smaller offices, at a relatively low volume, from Bolsover based businesses that wish to remain in the District - with a pattern of churn to better quality space (where it is available) and poorer quality space remaining vacant. As such, small scale office schemes, if a viable way to deliver them could be found, would be likely to be well received by occupiers. The supply of small office suites to support local businesses is an important component of the commercial property supply in Bolsover to sustain and enhance SME economic activity.

Within the industrial markets, Bolsover has competed well with neighbouring districts in attracting and accommodating large scale distribution and manufacturing businesses. With its good communications from the M1 and sites of the extent and quality of Castlewood Park and Coalite, it is anticipated that Bolsover will continue to fare as well as neighbouring geographies over the longer term in delivering space for such occupiers. In the immediate future,
however, it is likely that Chesterfield will see more delivery as the Enterprise Zone status of Markham Vale will give an enhanced financial basis to relocating occupiers seeking new premises.

5.13 On the mid-scale industrial property demand side, there is a strong base of indigenous manufacturing, engineering and logistics occupiers in local ownership and with valued local workforces. For these occupiers, there is no occupancy cost advantage to be gained by moving out of Bolsover (other Districts have similar, or slightly higher, rents) but, the supply of mid-scale properties is very restricted. Careful consideration needs to be given to initiatives to aid the supply of mid-scale industrial space to ensure Bolsover can continue to accommodate occupiers of this scale as their requirements grow and change over time.

5.14 For the smallest scale industrial property, the pattern in Bolsover is near identical to the surrounding Districts. Demand is strong, supply of good quality space is very limited and no new stock is currently being delivered. Bolsover does not have an advantage or disadvantage over neighbouring areas for this type of commercial property. Like other areas, the challenge is to find ways to help new stock come forward as the worst quality stock falls into disrepair and out of use.

Industrial

Prime Industrial – Occupiers

5.15 Occupier demand in Bolsover for large, new build industrial buildings has been strong in recent years. Requirements have come from a mix of sectors. For the distribution sector, the central England location and good access to the M1 have made Bolsover an attractive option. There has also been significant take up from manufacturing companies in the engineering and food industries. Occupiers of large buildings that have chosen Bolsover notably includes Tesco, who have a major distribution facility at Barlborough Links, which according to VOA data amounts to 49,144m² (529,000 sq ft); Sports Direct, who acquired 55,742m² (600,000sq ft) at Brook Park Park, Shirebrook; and Co-operative Food who occupy 44,594m² (480,000ft²) at Castlewood Business Park.

5.16 Demonstrating the continued appeal of the wider area, albeit at Markham Vale West in the Chesterfield Borough, a pre-let agreement has been completed with Great Bear Distribution for a 44,527m² (479,285ft²) building on a 10 year lease at £51.00 per m² (£4.75 per ft²). Construction is scheduled to start in September 2015 with completion in Spring 2016.

5.17 A key feature of the logistics sector demand is that it will usually only consider buildings located on motorway junctions, with no appetite for eastern parts of the District. Transport links to the east of Bolsover are regarded as poor – it can be difficult for low paid workers to travel to sites by public transport reliably and conveniently. Although logistics makes up only a part of the occupier base,
this factor has a disproportionate impact on investor and developer confidence, with developers seeking to minimise risk and maximise the appeal of their sites/buildings by sticking to the motorway network.

5.18 A notable exception to the dominance of the M1 corridor in large scale industrial space development in Bolsover has been the development of the 45 hectare Brook Park scheme in Shirebrook, which was chosen in 2004 by retailer Sports Direct as a new 55,750m² (600,000ft²) national distribution centre to replace its previous, smaller distribution centre in Dunstable. The consensus amongst property agents is that such a large requirement at Shirebrook is not typical of the market - it reflected Sport Direct's flexibility as an owner occupier and focus on a lower property cost base than better located sites – and is unlikely to be repeated.

Prime Industrial – Development and Supply

5.19 Despite the healthy demand from large industrial occupiers that Bolsover has experienced recently, the development and investment markets remain cautious. This has an adverse impact on the supply of buildings, with no developers building space speculatively. Several factors contribute towards this cautious position:

- Bank lending conditions have improved, but lenders have strict lending criteria and are seeking to minimise risk as much as possible. At this stage in the current cycle, lending for speculative property development is largely absent in regional locations. Lending is also limited to traditional sources, with no evidence of overseas investor interest / involvement in funding (as has become typical in London).

- A change in business rate liabilities for empty properties in the late 2000s has made it much more expensive for developers to hold completed but empty buildings until they let. For developers, this represents a high revenue cost on top of major capital investment (normally with some form of loan servicing). There are examples of large buildings in other, not dissimilar, geographies that completed in the late 2000s and sat empty for several years with severe consequences for the developers / building owners / lenders.

- The financial viability of development is still challenging. Capital values of buildings have recovered some of the ground they lost in the crash, but build costs have risen too in the recovery as a consequence of the capacity that the industry lost in the recession. Any adverse ground conditions, contamination or abnormal or off-site infrastructure costs can erode the developer margin. Having the certainty of a pre-let agreement for 10 or 15 years is a key way of increasing the investment value over delivery costs to achieve viability.
• Given the 10 – 15 year leases occupiers are required to commit to, and the high level investment they make in moving in to premises, re-locating and recruiting staff, occupiers are very focused on ensuring they take a building the exact size they require to give them lower property costs over the long term. A developer could therefore lose out on a requirement if it had speculatively built a building that is, say, 460m² or 930m² (5,000ft² or 10,000ft²) larger than a requirement.

This means that the prime industrial, large building market in Bolsover is characterised by a complete lack of supply of available new buildings. Instead, this market is made up of pre-let opportunities. Property agents do not see a return to speculative development of large buildings in the foreseeable future. This is not an unusual situation and is mirrored in many other parts of the UK regions.

Where a market is made up of pre-let opportunities, it becomes led by the deliverability of the supply. As pre-lets require an occupier to commit to a building before it is constructed, it is a minimum of 6 months and often 12 to 18 months, from the point where the occupier makes its property decision to the point where it takes occupation of the space. This time frame can often represent: a delay to expansion; consolidation of multiple sites; or investment in new equipment to the occupier. Hence there is pressure to deliver the new building as swiftly as possible. Occupiers will therefore focus on the deliverability of different options when choosing between pre-lets. Those sites which have infrastructure, geotechnical and contamination matters already resolved will out-perform those where some of these issues remain to be tackled. This has a direct effect on the sequence and timing of the supply side of the market.

The Markham Vale East scheme located in neighbouring Borough of Chesterfield has performed well in attracting occupiers including: Andrew Page (9,300m²); Gould Alloys (4,650m²); Holdsworth Foods (3,060m²); Industrial Ancillaries (3,120m²); and Ready Egg Products (3,220m²). The delivery of the amenities and support facilities at Markham Vale West has been seen by agents as a big benefit in helping Markham Vale compete well with other sites. A grant of £14.2 million has been secured from the Sheffield City Region Enterprise Zone to meet the infrastructure and abnormal costs of the final phase of Markham Vale North, which is located within Bolsover on the former Seymour colliery. Infrastructure works have commenced on site and it is anticipated that occupier requirements could be met on the site from late 2016 / early 2017 onwards. Markham Vale North has the ability to meet building requirements in the range 4,645m² to 70,000m² (50,000ft² to 750,000 ft²).

The Enterprise Zone status at Markham Vale gives occupying businesses up to 100% enhanced capital allowances tax incentives, giving it a major competitive advantage over other sites, which means the site is likely to attract occupiers before competing sites such as the Coalite site. Given that developers are careful not to create a situation of over-supply in a market (to
maintain values) the Markham Vale scheme could effectively delay some other schemes until it has been substantially taken up.

5.24 **Castlewood Business Park** to the east of J28 of the M1 (its junction with the A38 trunk road) is a key competitor to Markham Vale North with around 111,500m² (1.2 million ft²) of pre-let opportunities. It has a strong position in the market as all infrastructure is in place and the site is “shovel ready”, however, it cannot accommodate the largest requirements as its maximum plot size gives a building of 21,670m² (233,250ft²) and it does not have the Enterprise Zone status and tax incentives.

5.25 The former **Coalite site** is a 34 hectare brownfield site located to the east of Junction 29A of the M1 motorway. Its industrial legacy has left it with ground condition and contamination issues that will be tackled as part of the development process. Although it is being actively marketed, it is still a little way from being “shovel ready”. In August 2015, the Council resolved to grant outline planning permission for a revised application, subject to agreeing conditions. Knight Frank, the agent promoting the scheme, asserts that a start on site is envisaged in 2016, though any actual development here will only commence once the clean-up of the contaminated land has been completed. In common with other schemes, it is understood that the developer is not currently planning any speculative employment space. The developer will deliver pre-let buildings from around 1,850m² (20,000ft²) upwards, but a first building of around 9,300m² (100,000ft²) is likely to be required to achieve viability on the first phase. It is likely that development at the Coalite site will really get underway when other, more ready sites such as Markham Vale and Castlewood Business Park no longer have capacity to meet new requirements. D2N2 and Sheffield City Region LEPs have submitted applications to have Coalite designated as an Enterprise Zone.

5.26 It is likely that the worst contaminated land at the Coalite site will not be built on but will be marketed as external hard standing space for uses such as vehicle parking. This is an important part of occupier requirements in the area. There have been a number of long running requirements for open storage land close to the M1 from Western Power and Severn Trent that have not been satisfied, together with requirements from hauliers for lorry parks. The worst contaminated parts of the Coalite site might provide supply to suit such requirements.

5.27 Agents feel that land that is promoted around Staveley in Chesterfield District, including a former St Gobain site, could provide key competition for Bolsover sites in the medium and longer term.

**Rental Levels**

5.28 Prime Industrial rents are firmly established at £54 per m² to £60 per m² (£5.00 per ft² to £5.50 per ft²) for motorway junction located large buildings in Bolsover. The Great Bear deal was at slightly under this level at £51 per m² (£4.75 per ft²) due to its scale and the public sector investment in the site. It is felt that rental levels of £54 per m² to £60 per m² (£5.00 per ft² to £5.50 per ft²)
will hold firm for several years and are unlikely to see significant growth, due to the availability of competing product in other areas. Lease lengths for pre-lets are generally 15 years to reach required investment values, though 10 year leases or 10 year break options have been secured by occupiers on some deals. Given the view of agents that rents are unlikely to rise above their current levels in the medium term future, it follows that the viability challenge for sites is likely to remain for the same period.

Secondary and Tertiary Industrial

5.29 The majority of the built stock supply is older and smaller than the prime market, but this is the stock that accommodates the bulk of the businesses and the majority of the activity in the District. Agents report increasing confidence and demand from local occupiers looking to expand into larger or higher specification space. The local nature of many businesses was emphasised, with often local ownership/entrepreneurship at the helm and a long standing, local workforce. These businesses have generally followed the pattern of the economic recovery and are enjoying better times and have a positive outlook going forwards but wish to remain rooted in Bolsover.

5.30 The key characteristic of this occupier demand is that it generally does not take space on the pre-let route. The majority of the mid-size requirements are more comfortable taking an existing building, and are more likely to compromise on the location than take a pre-let or forward commit to a building purchase.

Mid-Size Stock

5.31 Occupier demand for mid-sized industrial stock has been and continues to be strong, not only in the District but also in the surrounding area. The is illustrated by the letting of 1,860m² (20,000ft²) to Greenbank Engineering Services Limited at Craggs Industrial Estate in Creswell.

5.32 Demand is considered to be running ahead of supply by property agents. They point to an acute shortage of stock in the 465m² to 4,650m² (5,000ft² to 50,000ft²) size range. This has shown itself in two ways.

- **Moving out of Area** An example was given of a specialist electronics manufacturing company outgrowing its existing facilities in Bolsover and seeking a new unit of 929m² to 1,400m² (10,000ft² to 15,000ft²) on a freehold basis without success. It was not prepared to consider a leasing or pre-let option so has had to widen its search area to Derby to try to secure a new building.

- **Subdivision of existing buildings.** PMW Property Developments recently acquired 6,875m² (74,000sq.ft.) of manufacturing and warehouse space at the Clover Nook Industrial Estate. This was refurbished and split into ‘mid-sized’ units (in a scheme called West 28) which have been taken up quickly by occupiers.
5.33 Whilst the conversions of larger spaces to smaller units are welcomed, agents are pessimistic about developers delivering new build mid-size units, unless they can be delivered in tandem with a much larger pre-let unit.

5.34 Rental levels vary significantly with the quality and specification of the space and range from around £21.50 per m² to £54 per m² (£2.00 per ft² to £5.00 per ft²). Agents report that rents have seen some growth on the best located and better let schemes, and are now in line with pre-recession levels. It was noted that rents for industrial space have been growing more generally in Nottingham and Derby, but agents felt that Bolsover was likely to remain a slightly cheaper location for mid-size occupiers.

**Small Scale Stock**

5.35 All the agents reported strong demand in all parts of the District for small units from predominantly local businesses.

5.36 In Creswell, there is a good market for small units. The 29 unit 115m² to 230m² (1,250ft² to 2,500ft²) Craggs Industrial Estate and the 12 unit 45m² to 115m² (500ft² to 1,250ft²) Enterprise Core have performed increasingly well over the last 3 years and are now fully let. Rents at Craggs have climbed from £21.50 per m² to £37.50 per m² (£2.00 per ft² to £3.50 per ft²). The smaller units at Enterprise Core let quickly at rents of £48.50 per m² to £54 per m² (£4.50 per ft² to £5.00 per ft²). The majority of occupiers are start-ups or small local businesses.

5.37 Agents flagged a near complete lack of supply of good quality 185m² to 465m² (2,000ft² to 5,000ft²) stock, with most enquiries invariably satisfied in the neighbouring locations such as Worksop or Mansfield. For smaller scale stock Bolsover has a rent advantage over neighbouring centres at up to around £54 per m² (£5.00 per ft²) compared to, for example, a recent 167m² (1,800ft²) letting in Worksop which was completed at £81 per m² (£7.50 per ft²).

5.38 Availability is less constrained for poorer quality small stock. Whilst smaller, poorer quality stock suited some occupiers, such as small businesses in motor vehicle repair sector, many occupiers, and particularly those making or handling a product that can be spoilt by damp or water, require better quality space. Rents for the poorer quality stock range from nil (occupiers taking on the rates liability but paying only a peppercorn rent) up to about £32 per m² (£3.00 per ft²) for the better located and better quality secondary and tertiary small units.

5.39 Development of new units at Creswell Colliery would be welcomed but caution was expressed about the pace of phasing to ensure supply does not outstrip demand. Given development market sentiment it was felt unlikely that there would be major releases of new space.

5.40 Agents expressed concern over the difficulty in seeing where new, small unit development would come forward. The popularity of schemes such as Langtree’s Barlborough Links Network Centre (made up of 12 units of 140m² to
325m² (1,500ft² to 3,500ft²)) with occupiers was highlighted, but a key question remains as to whether any private sector developers will bring such supply forward without public sector support.

**Rural Workspace**

5.41 The majority of employment space and economic activity in Bolsover is concentrated in the District’s key towns and settlements, which are more urban in character. Analysis of the latest available VOA data, for instance, shows that just 7% of all B class employment space in Bolsover is located outside of the main towns and settlements. Nevertheless, this would indicate that in the order of 57,400sq.m of space is located in the more rural parts of the District.

5.42 The analysis (presented in full in Table 4.1) indicates that the supply in such locations contains a disproportionately large share of workshop space. Indeed, whereas workshops account for 13% of floorspace across the District, this figure rises to 51% in the more rural parts of Bolsover (i.e. outwith the main towns and settlements). This would suggest that much of the space is smaller scale and generally industrial in nature, which would accord with the discussions held with local commercial agents.

5.43 Figure 5.1 provides a summary of recent employment change in Bolsover, presented at the Lower Super Output Area level. This demonstrates that employment growth in the District has largely been concentrated within the area’s main towns and settlements. This is unsurprising, given that such locations typically offer the best access to: local labour; shops and services; and road and rail connections. In addition, consultations with local commercial agents undertaken to inform this study indicated that rural businesses in Bolsover often face particular challenges relating to poor quality data infrastructure and mobile phone reception. As such, it is considered appropriate that Bolsover continues to pursue a strategy whereby the majority of employment allocations are located within or in close proximity to the main towns and settlements within the area.
Notwithstanding the above, the more rural locations in the District have an important role to play in supporting economic growth, most notably through the provision of appropriate premises to meet the needs of their immediate communities.

Discussions with commercial agents active in the area have indicated that the market for lettings of commercial space in such locations is largely informal – with deals largely done on a ‘hand shake’ basis between owners and occupiers – and is considered to be healthy at present. No particular gaps in provision were identified by the agents involved in the consultation process.

Space is generally provided on flexible terms and benefits from low rents and business rates. Consultees provided some anecdotal evidence of the provision of start-up space in converted farm buildings acting as informal business incubator space, with successful tenants then progressing over time to occupy more professional space on established industrial estates in the area, demonstrating the importance of such provision to the wider economic health of the District.

Encouragingly, agents with links to the agricultural sector indicated that they are currently experiencing strong interest from farmers looking to let space, suggesting that the supply of such premises is unlikely to dry up in the short term.
5.48 On the basis of the above, it is considered that farm diversification will continue to provide employment premises, on a small scale, in order to meet local need. The extent to which supply of this nature could be anticipated to meet employment space needs over the Plan period, however, is considered difficult to quantify. Indeed, monitoring data provided by BDC suggests that only one planning consent for the conversion of agricultural buildings to B class employment space has been granted in recent years.

5.49 It is recommended that planning policy continues to support rural based employment development through and responds positively to proposals that encourage the re-use of redundant agricultural buildings to meet future industrial and/or office needs.

**Office Sector**

5.50 The office sector in Bolsover was unanimously regarded as relatively weak, with only very local demand and a good supply of existing stock, though much of it is unappealing to occupiers. The stronger office markets of surrounding larger centres on all sides draws most office requirements, with only local firms that particularly want to be in Bolsover, or who are very cost sensitive, searching out accommodation in the Bolsover area.

5.51 The new, prime units that were delivered at Barlborough have seen terms soften to retain tenants. Net rents for the best space are between £86 per m² to £130 per m² (£8.00 per ft² to £12.00 per ft²). Poorer quality space in other locations attracts rents of £54 per m² (£5.00 per ft²) or less. Leases are typically 3 years with a break at 18 months.

5.52 Agents underlined a total lack of developer / investor confidence in office development. Several office buildings that have been offered for sale have taken a long time to sell, or have sold on the basis of potential for residential conversion. Examples include Eastwood House at Clowne – marketed for 12 months as office space and then purchased to be converted to 8 bedsits.

5.53 There is a lack of new supply of new small business centre type offices. Schemes such as The Tangent at Shirebrook (which had European grant funding) are now 100% occupied\(^{43}\) and there are no obvious new, alternatives coming to the market. There is concern that this will lead to some start-up businesses that would otherwise be in Bolsover moving out to other areas.

5.54 Agents pointed to the dominance of technology in ways of working in offices, with technology making it easier for people to work from home and travel to a larger centre less frequently. This was seen as a factor in weakening demand for office space in Bolsover over the last 10 years.

\(^{43}\) As at June 215
Conclusions

5.55 There appears to be a reasonable supply of land to accommodate commercial property development at this point in the cycle but caution over the speed at which it will be brought forward given ground conditions and the development viability gap. It is clear that the viability gap between achievable rents/capital values and delivery costs is having a far greater influence on the supply of new industrial space than land supply. Agent sentiment is that it is not envisaged that this situation will change significantly over the next few years.

5.56 There is an acute shortage of mid-size industrial stock in the range 465m² to 4,645m² (5,000ft² to 50,000ft²) and no apparent prospect of speculative development to increase supply. There is a distinct mismatch between Bolsover’s industrial occupiers that want to grow but do not want to commit to a pre-let, and Bolsover’s developers that only want to commit to development with a pre-let.

5.57 Occupiers will either have to commit to pre-lets or forward purchase of buildings, or will have to expand their search areas to include neighbouring larger centres and the stock opportunities they provide.

5.58 If market conditions change more than envisaged, and there is a return to easier viability for development in Bolsover, the central location of Bolsover could mean its available land supply comes under pressure from national footloose requirements as well as local companies. In such circumstances — and without the provision of sufficient supply to accommodate such demand - this could serve to constrain economic growth going forwards.

The office market is felt to be in equilibrium at a low level. Occupier demand is weak and limited to indigenous businesses with a strong link to the District, rents are low but there is plentiful second-hand stock in the District. Where new, appealing new stock has been delivered, such as The Tangent scheme, it has been popular with occupiers. Agents do not see any new schemes coming forward in the foreseeable future unless led by the public sector.
6.0 Review of Employment Sites Portfolio

6.1 This section presents the findings of an assessment of the current employment land supply in Bolsover. It considers the characteristics and quality of existing and potential employment sites in the District and their suitability to meet future employment development needs.

6.2 In some instances, whilst sites have been assessed as being of good or average quality against the identified criteria, their deliverability may still be challenging in the absence of public sector funding. In general, this is likely to be a particular issue for undeveloped sites in the east of the District. It is important, however, to recognise that any challenges in respect of delivery are primarily considered to be a reflection of local market conditions, rather than a function of any particular site specific issues or the absence of local demand. As such, it is considered that there is little merit in de-allocating existing sites and replacing them with new allocations as this is unlikely to have a material impact upon the prospect for delivery of employment space in the District's weaker market locations. Nevertheless, it is considered important to ensure the availability of sites and premises throughout the District, with BDC working with the LEPs and other public sector agencies in order to bridge the viability gap.

6.3 In consultation with the Council it was agreed that the assessment should be structured on 26 employment sites, collectively amounting to 205.6 hectares. Some of these sites are currently designated for employment use; while others are non-allocated but have an extant permission for B1-B8 development, or are sites that are potentially suitable for employment purposes.

6.4 All 26 sites were inspected and, in accordance with Government guidance on Employment Land Reviews, these were assessed against the following criteria:

- strategic and local road access;
- proximity to labour and services;
- adjoining uses that might constrain employment uses;
- site size, characteristics and potential development constraints; and
- market attractiveness

6.5 Other factors were also noted including suitability for specific uses, planning constraints, potential timescale for delivery, and whether there were any barriers to the delivery of undeveloped sites. Details of each assessed site, and how they rate against the assessment criteria are contained in Appendix 2.

6.6 It should be noted, however, that this assessment process in itself does not necessarily provide a complete picture of the local significance of certain sites. A site, for example, could be considered as having the potential to satisfy particular business or sector needs, which can be important reasons for retaining it, even if it does not perform well against conventional site
assessment criteria. Commentary on such issues is therefore provided on each site to supplement the formal scoring exercise.

6.7 Further to presenting an overview of the employment land considered in this assessment, a summary description is provided for each of the assessed sites, with corresponding reference number shown in square brackets.

Overview of Sites

6.8 As summarised in Table 6.1, in overall terms 203.71 hectares of land was assessed in this study, 66.56ha of this provision relates to land in Clowne; 38.26ha relates to six employment sites in Bolsover; and 54.22ha is located outwith the District’s key towns and settlements – namely the former Oxcroft disposal point on Mill Lane and land at Seymour, which forms part of Markham Vale.

6.9 The table also indicates that the assessment was based upon 14 sites which are currently allocated for employment use, collectively amounting to 27.10 hectares. The remaining 12 sites total 176.61 hectares – representing the vast majority of the assessed land. Presently these are non-allocated but have an extant permission for B1-B8 development, or are sites that are potentially suitable for employment purposes. Large, non-allocated sites that were assessed notably include land north of Clowne, the former Oxcroft disposal point as well as the former Coalite site.

Table 6.1  Distribution of Employment Sites

<table>
<thead>
<tr>
<th>Allocated Sites</th>
<th>Non-Allocated Sites</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sites</td>
<td>Area (ha)</td>
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<tr>
<td>Barlborough</td>
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<td>-</td>
</tr>
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<td>Bolsover</td>
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<td>4.07</td>
</tr>
<tr>
<td>Clowne</td>
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<td>-</td>
</tr>
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<td>3.08</td>
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<tr>
<td>New Houghton</td>
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<td>-</td>
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<tr>
<td>Pinxton</td>
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<tr>
<td>Pleasley</td>
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<td>0.80</td>
</tr>
<tr>
<td>Shirebrook</td>
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<tr>
<td>South Normanton</td>
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</tr>
<tr>
<td>Whaley Thorns</td>
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<td>1.67</td>
</tr>
<tr>
<td>Whitwell</td>
<td>2</td>
<td>8.17</td>
</tr>
</tbody>
</table>
Figure 6.1 shows the location of all 26 sites assessed as part of the process.

Figure 6.1  Spatial Distribution of Assessed Sites

Source: NLP analysis

Allocated Sites

This section provides an overview of each of the allocated sites visited during the site assessment, with a corresponding reference number shown in square brackets.

Land North of Bolsover Business Park [1]

Amounting to 1.65 hectares this allocated site is situated immediately to the north of Bolsover Business Park. There is a reclaimed tip to the north, residential to the east and employment uses to the west and south. The site is unused and generally overgrown. It consists of uneven land and has no access point from Northgate. The site is in relatively close proximity to two bus stops and a public house (the Castle Arms), and further local services are available in Bolsover’s town centre. Potentially some remediation work may
need to be carried out, but the site appears to offer reasonable potential for B1(c) and B8 uses, although there is no evidence that it is currently being actively marketed as a development opportunity and there are a number of other sites relatively nearby which have greater market appeal. It is recommended that the site is retained for employment use. In overall terms it achieved an average score in this assessment.

**Mansfield Road, Hillstown [2]**

This greenfield site (1.12 ha) is located on the southern edge of Bolsover, immediately to the east of Hillstown Small Business Centre, which is managed by Derbyshire County Council and contains a number of small workshop units of reasonable quality in an attractive setting. None of these units were vacant when the inspection occurred, but there is an element of encroachment of ‘Non B uses’ – the shop K & D Bridal Boutique operates from one of the units, and another is used as a gym by the Kickboxing Academy. The site itself occupies part of a large, level field that is classified as very good (i.e. grade 2) agricultural land. Although the site is relatively near to a residential area and borders a playground to the north, it is unlikely that this will give rise to any insurmountable issues regarding the compatibility of uses. The site appears to offer reasonable potential for providing small workshop units. However, there are few services in the immediate vicinity and it is approximately 5.4km from junction 29a of M1 passing through residential areas of Bolsover on secondary roads. In summary, this is an average employment site when considered against assessment criteria.

**Riverside Way, Bolsover [3]**

The allocation at Riverside Way lies in a prominent location on the main access route (the A632) into Bolsover town from the west. The unused, overgrown site (1.30ha) adjoins two small B8 units on the Gateway Business Park and is close to other established employment sites, notably including Intake Industrial Estate and Bolsover Business Park. There are no adjoining incompatible land uses. While the site is in very close proximity to two bus stops and a public house (the Castle Arms) there are no further amenities/services in the immediate vicinity, albeit a good range of these are provided in Bolsover's town centre which is approximately 1.3km from the site. On first glance the site appears to offer reasonable potential for B1(c), B2 and B8 uses. However, it has been marketed as a commercial development opportunity for a considerable amount of time and is yet to come forward. The site lies within the setting of Bolsover Castle, a grade I listed building and a scheduled ancient monument, which is a major tourist attraction for the area. Historic England has expressed concerns that future developments in Bolsover should not detract from the visual impact of and views to the castle, which may have dampened market interest in this site. Nevertheless, the success of Markham Vale and the possibility that the Coalite site (See NLP Ref: 17) could be coming forward, bodes well for this site and it is recommended that it should
be retained for employment use. In overall terms this site achieved an average score in this assessment.

**Colliery Road, Creswell [4]**

6.15 This site is located immediately to the south of Creswell Business Park and comprises unused land, which formed part of the former Creswell Colliery. The 1.51 hectare site has a regular shape and was previously used as a car park. It is flanked by a railway line to the east, whereas to the west there is a youth centre beyond which is Creswell model village, a conservation area. Local access to the site is unconstrained and it has adequate access to labour. The site is within walking distance of Creswell railway station and the amenities/services of the village. However, it is constrained by poor access to the strategic road network. In addition, there is no evidence that the site is currently being marketed. There is likely to be very little market interest in this site and while it could possibly be used to accommodate expansion of local businesses, when the inspection occurred it was noted that two units in the adjacent business park were vacant, indicating that local demand for space here is presently weak. In summary, this is an average employment site when considered against assessment criteria.

**Creswell Colliery South, Creswell [5]**

6.16 This vacant site (1.57ha) also formed part of the former colliery. It lies to the south of the remaining colliery building (believed to be the mine water pumping station) and is surrounded by former colliery land, with a railway line to the east. Previously the site comprised a number of colliery buildings and relatively recently the Coal Authority has removed the remaining hard standing and created a ‘suitable platform for future industrial/commercial use’. However, it is understood that the entire former Creswell colliery site is leased to the Coal Authority, who had contractual duty to carry out this work and there is no evidence of any development activity occurring on this particular parcel of land and similarly there is nothing to suggest that it is currently actively being marketed as a commercial development opportunity. Indeed, it is felt that demand for commercial accommodation in the settlement of Creswell is overwhelmingly reliant on indigenous businesses and this is not perceived to be strong enough – at least in the short/medium term - to allow the Creswell Colliery South site to be developed out for B use employment purposes. The site is also clearly constrained by poor road access, both strategically and locally, given that Colliery Road does not extend to it and an access road will need to be provided. Having said that, it has reasonable access to labour and services/amenities, and no environmental or development constraints were identified. In overall terms this site is rated as average when considered against assessment criteria.

**Beaufit Lane, Pinxton [6]**

6.17 This site is located on the east side of Beaufit Lane in an established employment area. There are no adjoining incompatible land uses.
Immediately to the north of the site is a warehouse with large yard, whereas to the east the site borders the M1 motorway. The 2.95 hectare site had recently been used as part of the former Langton Colliery spoil heap recovery scheme but that has now completed. Currently part of the site is being used for open storage purposes, but most of it is unused and comprises scattered scrub/trees with grassland land. The site has very good access to the M1 motorway (junction 28) and labour, and reasonably good access to services and amenities. However, a large amount of the site (c.77%) falls within flood zone 3 and a footpath extends across the southern part of the site, which is a public right of way. Despite this, the site is well suited for B2/B8 use and in overall terms achieved a good score in this assessment.

**Land at Pit Lane, Pleasley [7]**

This grassland site is situated close to a major junction on the A617, approximately 5km from junction 29 of the M1. It forms part of the former Pleasley Colliery, which comprises grade II listed pithead buildings and is designated as an Ancient Monument. Amounting to 0.80 hectares the site is located to the south east of the pithead buildings and is in close proximity to housing. Immediately to the north of the pithead buildings is the former spoil heap, which has been landscaped and is now the Pleasley Pit Country Park, a nature reserve. The pithead buildings have been the subject of a significant restoration programme and are open to the public. An access road to the visitor car park extends around the site, and a spur of this road features an access point for the site whilst also serving nearby housing. Any development of the site will clearly need to have regard of the pithead, which will limit the height, scale and design of any scheme and implies that B2/B8 use is likely to be inappropriate. Potentially, a small provision of high calibre offices may be considered suitable, though Pleasley is a village on the outskirts of Mansfield and it is felt that there would be little market demand for this type of accommodation in this proximity. While the site has relatively good access to labour there are no nearby amenities or services. It is also constrained by having relatively poor access to the strategic road network, given the distance from the site to the M1 motorway. Conversely, the site has good local access. It is noted that there is an extant planning permission to develop up to 23 houses here\(^\text{44}\) which raises the question as to whether the site could continue to contribute to the stock of available employment land in Bolsover. However, this is an outline consent only, which has not been progressed and is due to lapse in September 2016. In overall terms this site is rated as average when considered against assessment criteria.

**Portland Road / Vernon Street, Shirebrook [8]**

This seemingly long term vacant site (4.49ha) borders Sookholme Road to the south and Vernon Street in the east. It is flanked by housing in the north and by industrial accommodation to the east and south, notably including Portland Drive Industrial Estate. The site is badly overgrown, slopes and has an

\(^{44}\) As per 12/00505/OUTMAJ
irregular shape. It is principally accessed from Sookholme Road and from this approach the access road extends towards the site between two long standing vacant industrial units, which are not being marketed and are in poor condition. In addition, the site has poor access to the M1 motorway and is understood to have fragmented ownership. These factors are likely to imply that there will be very little market interest in redeveloping this site for employment use. Nonetheless, no environmental constraints relating to the site were identified. It is also very near to Shirebrook’s railway station and is within walking distance to the town centre so has good access to labour and a broad range of amenities. Consequently, in overall terms this site is rated as average when considered against assessment criteria.

**Land south of Maisie’s Way, South Normanton [9]**

6.20

Totalling 1.05 hectares this site was earmarked to be the third phase of the ‘Village’, a high calibre office scheme, but the downturn in the property market brought these plans to a halt. The site is located immediately to the west of the A38 dual carriageway and adjoins the built out of element of the Village on its northern border. In the northwest it is bordered by housing on Carter Lane East and in the south there is a plot of land in agricultural use beyond which there is a hotel. In 2007 permission was granted to develop 6 office blocks here collectively amounting to 4,177sqm, although that permission has now lapsed. However, the site has been cleared in readiness of development and Maisie’s Way (which presently serves the existing element of the Village) extends to its northern border, so as to provide an access road for the site. No environmental constraints relating to this site were identified. It has exceptionally good access to the strategic road network (the A38 and the M1) and good access to labour and services/amenities. While the site is currently constrained by lack of market interest, its prominent position next to the A38 implies that office development here is likely to remain a viable option under more favourable market conditions. In summary, this is a good employment site when considered against assessment criteria.

**Land at Carter Lane, South Normanton [10]**

6.21

Amounting to 0.82 hectares this site lies immediately to the south of the undeveloped plot of land off Maisie’s Way (See NLP site reference 9). In the northwest it is bordered by housing on Carter Lane East, there is a hotel directly to the south; whereas it is flanked by hedge and trees in the east, beyond which there is the A38 dual carriageway. The site presently comprises paddocks and is used for agricultural purposes. It has exceptionally good access to the strategic road network (the A38 and the M1) and above average access to labour and services/amenities. While it is currently effectively landlocked, vehicle access could be provided from the adjacent plot of land. The site is in a generally attractive location and offers good scope to be a later phase of the Village scheme, by providing further B1 office accommodation.

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45 As per ref: 06/00818/REMMAJ (floorspace figure derived from Planning Officer’s report)
However, at the moment it is principally constrained by lack of market interest. Despite this, it performed well in this assessment.

**Park View (South), Whaley Thorns [11]**

6.22 This undeveloped parcel of land (0.58ha) lies immediately to the north of a fully developed, well maintained employment site on Park View, consisting of two high quality office buildings and several light industrial units, all of which are in use. The site is surrounded by Poulter Country Park to the north and west, and by housing to the east. However, trees mostly screen the site. It features a vehicle access point onto Park View and appears to have been cleared several years ago in readiness of development, but is now partially overgrown. The site lacks good strategic road access but is located in close proximity to a rail station and Whaley Thorns village, which provides local services and amenities. Whilst there is no evidence that the site is currently being marketed, it appears to offer reasonable potential to provide further high calibre office accommodation and/or light industrial units. In overall terms it achieved an average score in this assessment.

**Park View (North), Whaley Thorns [12]**

6.23 This grassland site adjoins Park View (South) and forms part of the Poulter Country Park, a very pleasant park. Amounting to 1.09 hectares the site slopes to the east and features pathways from the nearby residential area. If this site was to come forward for employment use, vehicle access could only be achieved by extending the access road via Park View (south), which will reduce the net developable area of that site. And, while it is in close proximity to the amenities/services that are available in Whaley Thorns village, the site lacks good strategic road access. These factors are likely to preclude development of this site for employment use. In overall terms this site achieved a poor score in this assessment.

**Whitwell Colliery (West of Southfield Lane), Whitwell [13]**

6.24 This site comprises unused land, which formed part of the former Whitwell colliery. Amounting to 3.89 hectares the irregular shaped site is located on the southern outskirts of Whitwell, on the west side of Southfield Lane, and extends around a bio gas plant. The site is surrounded by a quarry to the west, a railway line to the north, more former colliery land to the east and by a Lafarge Aggregates plant to the south. In 2006, when property market conditions were stronger, outline permission was granted to use the site for B1, B2 and B8 purposes, but this was not progressed and has now expired. A site visit and desk-based research have not identified any evidence to suggest that the site is currently being marketed as a development opportunity. Large amounts of hardstanding remain on this site which is mostly overgrown. The site has relatively poor access to labour and there are no nearby

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46 The permission for this bio-gas plant is ref: 10/00190/DCCON4
47 As per ref: 06/00319/OUTMAJ
services/amenities. Given its unattractive surroundings and poor road access (both strategic and local) this site appears to have very limited potential for traditional B1-B8 development. Indeed, on the outskirts of Whitwell there is a small cluster of industrial accommodation at the Southfield industrial site and two units there were noted to be vacant, suggesting local need for employment accommodation is already satisfied. Potentially, however, the site could be suitable for ‘bad neighbour’ uses in the future. In overall terms this site achieved a poor score in this assessment.

**Whitwell Colliery (East of Southfield Lane) [14]**

Amounting to 4.28 hectares and situated to the east of Southfield Lane this plot of unused land was also part of the former Whitwell colliery. This site has even less appeal for employment use than the site on the opposite side of the road. It generally comprises uneven ground and part of the site is designated a coalfield high risk area, so potentially may contain hazards which could affect development. In addition, the site is mostly set back from Southfield Lane and a suitable access point will need to be created. The site has relatively poor access to labour and there are no nearby services/amenities. The condition, poor strategic and local access, and unattractive surroundings are highly likely to preclude development of this site for employment uses, as reflected in the fact that it was the lowest scoring site in this assessment.

**Non-Allocated Sites**

The following section provides an overview of each of the non-allocated sites visited during the site assessment. This includes sites that have an extant permission for B class development, as well as sites, which potentially may be suitable for employment use.

**Bolsover Business Park [15]**

This site (5.5ha) is situated on the north side of the A632 on the western outskirts of Bolsover and comprises Bolsover Business Park, including the provision on Northgate, and the field alongside the Castle Arms public house. Both the business park and the provision on Northgate are accessed from Woodhouse Lane, a residential street. There are a range of employment uses here and none of the stock seems to be vacant. The provision on Northgate consists of a terrace of good quality, medium sized B8 units; whereas the business park features a number of former coal board buildings that have been converted to business units, which appear dated and possibly no longer fit for purpose. It is acknowledged that the latter may fulfil a local requirement for affordable business space, but it is considered to have very limited market appeal. In addition, the size of the car park at the business park is arguably larger than it needs to be and subsequently represents poor utilisation of employment land. As regards to the field, this slopes, is bordered by hedges and comprises an area of pleasant open land with trees. In this form this parcel of land mitigates the visual impact of the existing employment site as seen from Bolsover castle. It is also noted that the western part of the field and
part of the business park site is a coalfield high risk area, so potentially there may be hazards which could affect future development. While the site is in very close proximity to two bus stops and a public house (the Castle Arms) there are no further amenities/services in the immediate vicinity, albeit a good range of these are provided in Bolsover’s town centre which is approximately 1.2km from the site. In summary, this is a good employment site when considered against assessment criteria. It is recommended that the business park and Northgate are retained for employment use, while the adjacent field – which according to our calculation amounts c. 1.83 hectares - should remain in agricultural use. This would imply that the size of the retained site is approximately 3.67 hectares.

**Land between Brickyard Farm and Barlborough Links [16]**

This site lies to the east of Chesterfield Road (the A619), very near to junction 30 of the M1. Amounting to 4.44 hectares the site currently comprises grassland and is occasionally used for car boot sales, but previously was a landfill and there is a gas flare stack adjacent to the site’s entrance off Slayley Lane. The site adjoins Barlborough Links Business Park with office/warehouse/workshop units to the north eastern side and larger industrial/warehouse units to the south eastern side. There are two houses and agricultural land to the south western side. It is noted that in 2010 outline permission was granted to develop B1/B2/B8 here together with residential on land to the north west of Chesterfield Road and recently this proposal has been the subject of a number of revisions. The site is poorly serviced in terms of public transport links and there are no nearby amenities or services. In addition, there is scope for an element of infill at Barlborough Links Business Park and two plots there are currently being marketed as commercial development opportunities. Given that the site may need to be remediated and that there are alternative undeveloped sites in close proximity, employment use here seems unlikely in the short term. Nevertheless, the site has exceptionally good access to the strategic road network and is clearly highly suited for B1/B8 development. In summary, this is a good employment site when considered against assessment criteria.

**Coalite, Bolsover [17]**

The former Coalite plant straddles the boundary between Bolsover District and North East Derbyshire, and is historically associated with coal oil chemical processing. The plant, which is situated to the north west of Bolsover town, closed in 2004 leaving a legacy of contamination due to the former use that occurred here. This site (31 ha) relates to the part of the former works in Bolsover District, which lies to the north of the River Doe Lea and comprises land on both the north and south sides of Buttermilk Lane. The unused, contaminated site consists of various tank structures, derelict laboratory and

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48 As per 09/00370/OUTMAJ
49 Permission has been granted for variations to the proposal (13/0002/VARMAJ) and an application proposing further variations is currently being considered (15/00378/VAR)
office buildings, hard standings and roofed storage areas previously associated with the chemical plant. It is relatively isolated from local/amenities services and residential areas, and is surrounded by open countryside. Approximately 4.7 hectares of the site falls within flood zone 3, so has a high probability of flooding. Despite the contamination, the site also features a great crested newt colony, which given these are a protected species, may need to be migrated before development occurs here. On the other hand, the site is relatively close to Junction 29a, so has good access to the strategic road network and its profile has been strengthened by the success of Markham Vale. The market attractiveness of the site has also been bolstered by the fact that it was acquired by Bolsover Land Ltd in 2012 who aims to provide housing and employment opportunities here.\(^{50}\) In this respect, outline consent was recently granted to redevelop the site to provide B2 and B8 uses alongside 795 new homes, an energy centre, a transport hub, open storage and a museum/visitor centre\(^{51,52}\). Whilst the residential element of this proposal is within North East Derbyshire the entire commercial element of the scheme is to be developed on land in Bolsover District and in overall terms this would provide 26.73ha for B class uses. In the event that the site can be effectively remediated – given the size of the plots that could be made available and the strategic accessibility of the site – it has good potential for high calibre B2 and B8 uses. As things stand, this proposal is unlikely to be able to compete with Markham Vale, although it is understood that both the D2N2 LEP and the Sheffield City Region LEP have recently put forward a case for the site to be given Enterprise Zone status. It is acknowledged that the site has been allocated and remained undeveloped for a considerable period of time, but it is clear that a concerted effort is now being made to bring it forward and the underlying appeal of the site is strong. In overall terms it achieved an average score in this assessment. However, once ground conditions and viability issues have been overcome it must be viewed as a good site.

**Land East of Bolsover [18]**

Amounting to 1.96 hectares this site is situated on the eastern outskirts of Bolsover, on the northern side of Langwith Road (the A632) at its confluence with Rotherham Road (the B6417). It has an irregular shape and extends around a small car sales business on Rotherham Road and a *dog boarding kennel* on Langwith Road, other than this it is surrounded by fields. Currently the site consists of several buildings fronting onto Langwith Road that are used as a riding school and a field, for grazing the horses. The field is classified as very good (i.e. grade 2) agricultural land. Outline permission was granted in 2014 to develop a mixed use scheme here, which could potentially include a 60 bed care home, a children’s day nursery and class B1 (office and/or light industrial) units.\(^{53}\) Demand for new B1 business accommodation (offices or light industrial) in this part of Bolsover is unproven and the area is

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\(^{50}\) See: [www.coalite-regeneration.com](http://www.coalite-regeneration.com)

\(^{51}\) As per application 14/00089/OUTEA

\(^{52}\) The 795 new homes are planned for land in North East Derbyshire (Ref: 14/00145/OL)

\(^{53}\) As per 13/00209/OUTMAJ
overwhelmingly residential in character. In addition, Hillstown Small Business Centre, the nearest existing employment area to the site, currently suffers from ‘Non b use’ encroachment, which may suggest that the local need for traditional B class employment space is already satisfied. There are no nearby services or bus stops and the site is considered as having poor access to the strategic road network, given that its approximately 5.8km from junction 29a of M1 passing through residential areas of Bolsover on secondary roads. It is also noted that the masterplan for this mixed-use scheme indicates a new access point will be created at the eastern end of Langwith Road specifically to serve the B1 units and as there are traffic lights here and Langwith Road is a reasonably busy road this access point is likely to be poor. In summary, this is an average employment site when considered against assessment criteria.

**Former Miners Welfare Club, Clowne [19]**

Located in Clowne this site (0.56ha) comprises a vacant two storey building, an area for car parking, and disused bowling greens at the rear of the property. The surrounding area comprises a mix of residential and town centre uses. Formerly the site was used as a social club, but the building has clearly been vacant for several years. Its exterior is in relatively poor condition and it is understood that the interior may have been vandalised. When the site was inspected it was only being used for car parking. Colliers are actively marketing the freehold interest in the site, but it is understood that they have received very few inquiries relating to the possibility of using it for commercial purposes. Indeed, while there are a number of A2 premises close by, there appears to be very little employment stock within the town. The site is also constrained by being situated next to a conservation area. Having said that the site has very good access to labour and services/amenities, including the nearby Tesco store. And it has reasonably good access to junction 30 of the M1. In overall terms this site achieved an average score in this assessment.

**Land North of Clowne [20]**

This irregular shaped, sloping site extends to 66 hectares and comprises several fields that are currently used for farming. It is located on the northern outskirts of Clowne, in close proximity to housing and straddles both sides of the A618, mostly (c. 47.7 hectares) lying to the east of the road. The fields are classified as very good (i.e. grade 2) agricultural land. To the east of the A618 the site is situated immediately to the north of Hickingwood Lane, a narrow road unsuitable for HGVs. This part of the site is crossed by several public right of way footpaths and features several pylons, which will reduce the net developable area here. In addition, this part of the site borders Hickin Wood, which is designated as ancient woodland. To the west of the A618 all of the land that forms part of the site (c. 7.9 hectares) is located within the greenbelt. Local access to the site is considered to be poor and a significant amount of infrastructure improvements are likely to be needed in order to bring this site forward, potentially including the road widening of Hickingwood Lane. Conversely, the site has good access to junction 30 of the M1 and while there
are no amenities or services in the immediate vicinity the site is within walking distance to Clowne’s town centre. The site achieved an average score in this assessment.

**Land at Seymour, part of Markham vale, near Woodthorpe [21]**

Situated in open countryside to the north of junction 29a of the M1 this 12.2 hectare site forms part of Markham Vale, which is designated an Enterprise Zone. Markham Vale comprises a number of sites and straddles the borders of Bolsover, Chesterfield and North East Derbyshire. In 2005 outline permission was granted to provide B1, B2 and B8 uses on 360 hectares at Markham Vale\(^54\), and the timing of this permission was subsequently extended in 2014\(^55\). Since then Markham Vale has predominantly come forward on land in Chesterfield. In addition, a new link road is currently being built to the land at Seymour site, remedying its otherwise inaccessible location. Once developed the site, which is presently used for agricultural purposes, will have exceptionally good access to the M1 motorway and the rest of the strategic road network. However, the relative remoteness of the site implies it has poor access to local services and amenities, and as very few public transport routes operate in the vicinity of the site it is fairly inaccessible for people who do not own a car. In addition, a large part of the site is a coalfield high risk area, so potentially there may be hazards which could affect development here. These constraints are offset by the capital allowances that are available at Markham Vale and accordingly, once the link road is place, the site offers great potential for B1, B2 and B8 development. In summary, this is a good employment site when considered against assessment criteria.

**Land East of Rotherham Road, New Houghton [22]**

This greenfield site is located on the southern outskirts of the village of New Houghton. Amounting to 6 hectares it has been identified as potentially being suitable for mixed-use development of which 0.9ha may come forward for employment use. The site lies to the east of Rotherham Road (the B6417), close to its junction with the A617, and is currently used for grazing. To the north the site borders allotments, beyond which there is housing; to the west there is further housing and a school; whereas to the east and south, the site is flanked by fields. If part of this site was to come forward for employment purposes, its access point will clearly need to be improved. And while Rotherham Road is not a narrow road, access to the site could be restricted when children are arriving or leaving the nearby school. Conversely, there are bus stops in close proximity to the site and a range of services/amenities are available in the village. This site is considered suitable for B1 offices and/or light industrial units to meet indigenous demand. It achieved an average score in this assessment.

\(^{54}\) 02/00272/OUTEA
\(^{55}\) 13/00514/VARMAJ
Portland Road, Shirebrook [23]

Situated on the south side of Portland Road, just beyond Shirebrook’s town centre, this partially cleared site amounting to 2.11 hectares comprises had been earmarked for a new 4,191sqm Tesco store\(^{56}\), but earlier this year the retailer decided not to proceed with this development\(^{57}\). The surrounding area mainly comprises a mix of residential and town centre uses, although a footpath runs along the eastern boundary of the site beyond which there two medium sized B8 units, which front onto Sookholme Road. While these units are currently occupied, they appear dated and poorly specified. And on the opposite side of Sookholme Road are two further medium sized B8 units, which as discussed earlier (see NLP 8) have been vacant for a considerable period of time and are in a poor condition. Hence if this site was to come forward for B class employment use it is likely to be constrained by lack of market demand. B class employment use here will also be constrained by nearby housing and by the site’s poor access to the strategic road network - it is approximately 9km to the M1 motorway (junction 29). Conversely, no environmental constraints relating to this site were identified. In addition, it is very close proximity to the town centre so benefits from exceptionally good access to labour, public transport and a broad range of amenities/services. In summary, this is an average employment site when considered against assessment criteria.

Land to the rear of the Sycamores, South Normanton [24]

This undeveloped site is located off the Sycamores, a relatively narrow road, in an area that is overwhelmingly residential in character. Amounting to 1.16 hectares the site comprises scattered scrub with trees. It is bordered by housing to the north and east, a public park to the south, and by the Boundary (a public house) in the west. The site is considered suitable for C2 development and has an extant permission for residential and a rehabilitation unit for profoundly disabled children\(^{58}\). In employment terms, it could only be considered suitable for a modest provision of B1a (office) or B1c (light industrial) space and, given the location of the site, it is anticipated that there would be very little market interest in such a development. As such, it would appear unlikely that the site will be available for B class employment development over the Plan period. Whilst access to the site is constrained by residential streets, the M1 motorway is only a short distance away mostly via the B6019, which is considered to be a good road. Consequently the site has very good access to the strategic road network and similarly it has good access to labour and services/amenities. On the overhand, the site is situated within a coalfield high risk area, so potentially there may be hazards which could affect development. It achieved an average score in this assessment.

\(^{56}\) As quoted in ref: 11/00262/FULMAJ
\(^{57}\) As reported on 8/1/2015 – “Tesco plans for Shirebrook are axed”: http://www.chad.co.uk/news/local/tesco-plans-for-shirebrook-are-axed-1-7039890
\(^{58}\) As per ref: 11/00523/VARMAJ
Wincobank Farm, South Normanton [25]

6.37

Totalling 13.03 hectares this greenfield site borders several B8 units which form part of Berriotow Industrial Estate to the east, fields to the east, a former tip to the north and the A38 to the south. The preferred route of HS2 is understood to skirt the eastern boundary of the site, which slopes towards the north and is presently used for farming. It has prominent frontage onto the A38 and is situated approximately 1.2km from the M1 motorway (junction 28), so has excellent access to the strategic road network. However, a perimeter fence has been erected around the three adjoining units in Berriotow Industrial Estate and this will restrict the access points to the site. Potentially, an access point could be created off Cartwright Lane and a further one created to the north of the site, but the latter is far from ideal and will be dependent on effectively creating a new access road to connect with Berriotow Lane. While a fast food unit (McDonalds) is located at the A38/B6406 junction, which is just a short walk from the site there are no further amenities/services in the immediate vicinity. Similarly the site is poorly serviced in terms of public transport links. However, the site is viewed as having adequate access to labour and is well suited for B8 development. In overall terms this site achieved an average score in this assessment.

Former Oxcroft disposal point, Mill Lane, Stanfree [26]

6.38

This former coal stocking ground/depot (42.02ha) is located in open countryside, and as such it is surrounded by fields, although small parts of it border the M1 to the west and a recreation ground to the east. The unused site slopes towards the north and comprises large areas of hardstanding from its former use. The relative remoteness of the site implies it has poor access to labour and services/amenities. Similarly, very few public transport routes operate in its vicinity, meaning the site is fairly inaccessible for people who do not own a car. Junctions 29a and 30 of the M1 are c.5.3km from the site, but both motorway junctions are accessed via routes that pass through residential areas (Shuttlewood in order to access Junction 29a and Clowne in order to access Junction 30). In 2007 planning permission was granted to develop a small opencast coal operation on the western part of the site and while this has now expired it has established that there are untapped coal reserves at this site and proposals to mine this may again come forward in future. Part of the site is also a coalfield high risk area, so potentially there may be hazards which could affect future development. Ultimately, in the short term at least, the prospect of any form of employment development occurring here seems remote – possibly it could accommodate ‘bad neighbour’ uses in the future. Despite this, in overall terms this site achieved an average score in this assessment.

59 As per 11/00273/FUL
60 As per application submitted to Derbyshire County Council (Ref: CM5/0106/161)
7.0 Understanding Business Needs

7.1 Planning Practice Guidance [§30] identifies the need to ensure that Local Plans are underpinned by an understanding of business needs. In particular, it highlights the need to consider market intelligence – gathered through a range of approaches – in determining future requirements for employment space:

7.2 This EDNA has been underpinned by – and its conclusions informed by – extensive engagement with local stakeholders and businesses, including the following methods of consultation:

1. Discussions with commercial property agents active in the study area;
2. Telephone interviews with key business and economic forums active within the local area;
3. A survey of business needs and views of the study area as a business location; and
4. A stakeholder workshop.

7.3 This section of the report provides a summary of the main findings emerging from items 2-4 listed above. It should be noted that the discussions held with commercial property agents were undertaken to inform Sections 4.0 and 5.0 and the key messages identified are reported within these sections.

Business Surveys

7.4 A survey of local businesses was undertaken during May and June 2015. The survey was sent to 120 business contacts located in Bolsover District. Further prompts to businesses were subsequently sent out – and the deadline for responses extended – in a bid to maximise the response rate achieved.

7.5 Unfortunately, despite the best efforts of Bolsover District Council and NLP, the response to the survey was disappointing, with just 21 completed surveys submitted. This clearly limits the extent to which meaningful conclusions can be drawn from any analysis of the results. However, it is important to note that this EDNA does not rely solely upon the survey data to understand business needs. Rather, it draws upon intelligence gathered through a range of additional consultation approaches (including interviews and workshops with commercial agents and business and economic forums).

7.6 The key findings of the business survey are summarised in the following paragraphs. As outlined above, however, they cannot necessarily be considered to be representative of the business community as a whole.

7.7 Business Background

7.8 The industrial diversity of the study area was reflected in the profile of participants. 4 respondents classified themselves as general manufacturing, 3 hospitality & tourism, 2 logistics/distribution and 2 construction, as well as 1
each for advanced manufacturing, creative/digital/new media, property management, financial & professional services, warehousing, libraries, childcare and 3 not specified.

7.9 Businesses ranged in size from one with just 2 people working at their location to another with 110 people. Within this range, the majority of respondents were towards the smaller end of the spectrum, with 11 firms indicating that they employ fewer than 20 people and just one employing in excess of 100.

7.10 Despite the majority of respondents (12) indicating that they are single independent operations, the majority were also found to be operating and competing on a national or international scale. In total, 18 businesses stated that the majority of their customer base is national (16) or international (2). In addition, a total of 16 firms suggested that the majority of their competitors were national (13) or international (3).

7.11 A high proportion of businesses were also long established businesses, with 13 having been located at their current site for 10 years or more and only 2 businesses located at their current address for 3 years or less.

7.12 **Current Premises**

7.13 Businesses were asked to classify their current location. The majority of respondents (6) indicated that they occupy premises on an industrial estate, followed by business/office parks (4) and live/work units (3). The bias within the sample towards industrial premises is clearly a reflection of the profile of respondent businesses, who are largely engaged in manufacturing and distribution-based activities.

7.14 7 of the 21 respondents had relocated to their current premises from elsewhere. Of those relocating businesses, 4 had moved from elsewhere in Derbyshire, 1 from Nottinghamshire and 2 from the South East (London and Watford). Whilst the sample size is too small to enable any firm conclusions to be drawn, the pattern of business movements implied by the business survey would appear, generally, to reflect the broader sphere of influence of the study area in economic and commercial market terms as acknowledged by the geographical extent of the Derby, Derbyshire, Nottingham and Nottinghamshire Local Enterprise Partnership.

7.15 The survey sought respondents’ views on those factors that had influenced their decision to move to or locate in Bolsover. The 10 most significant issues identified are summarised in Figure 7.1. The graph illustrates that access to road/rail/customers/suppliers and resources are of equal importance to businesses in Bolsover. Whilst the number of responses to the importance of the local labour market was lower, a higher proportion of respondents considered this to be of very high/high/average importance compared with those stating very low importance.
7.16 This is broadly consistent with respondents’ views regarding the advantages of Bolsover as a business location. Indeed, the area’s proximity to the strategic road network was clearly identified as the single biggest advantage of the study area, with participants also recognising the positive impact of Bolsover’s rural location in supporting tourism and leisure activities.

7.17 The views of respondents were also sought on those factors that had influenced their selection of their current premises – in favour of other space that may have been available at the time. A summary of all responses is provided in Figure 7.2. This illustrates, quite clearly, that respondents considered quality, cost, flexibility, security, car parking and ICT access to be of equal importance, with half of the respondents citing these factors as either very high, or high importance. It must, however, be recognised that this analysis is based upon a very small sample of responses and may not therefore be representative of the views of the wider business community in Bolsover.
7.18 The survey sought feedback from businesses regarding the quality and suitability of their existing premises. 10 of the 21 participating firms rated their premises as good or excellent, with 5 additional firms indicating that their premises were considered to be of average quality. A number of the more positive respondents stated that their premises had been purpose-built specifically to accommodate their operational needs.

7.19 10 of the 21 businesses suggested that their current building provides the correct amount of space to meet their needs, whilst a further 2 respondents indicated that they have additional, spare space. However, 6 participants stated that their current premises provide insufficient space to meet their business needs – although 3 of these businesses still considered their premises to be of a good quality.

7.20 Businesses were asked whether they had previously experienced any difficulties in finding suitable premises to expand, upgrade or relocate to within the local area. 12 participants responded to this question, with 4 indicating that they had experienced problems. Particular challenges identified by participating firms included: a shortage of buildings of a suitable site and quality; and limited access to finance; and access issues.
Future Premises

7.21 The survey data indicates that 12 of the 21 participants expect their business to expand over the next few years, resulting in a need for additional land or floorspace. Expanding businesses represented a range of industries, including general manufacturing, construction, hospitality & tourism, warehousing, logistics/distribution/property management and financial & professional services.

7.22 Based upon an analysis of the survey responses, the growth of these 7 firms could be expected to create demand for approximately 22,250sqm of floor space, although 6 of 12 the firms indicated that they have sufficient expansion land to accommodate this growth on or adjacent to their existing site.

Consultation Findings

7.23 In-depth consultation was undertaken with key business and economic forums and stakeholders active within the local area. This included telephone interviews and a workshop which was held on the 4th August 2015 to help test the emerging findings of the study with a range of local stakeholders.

7.24 The consultations were also used to discuss, in broad terms, the future level of demand for employment land that the study should plan for and the trade-off between ambition and realism implicit within the various scenarios considered.

7.25 The paragraphs below provide a summary of the key messages that emerged from the consultations:

Future Opportunities

- The proximity to the strategic road network is a key asset for Bolsover and is key to the District’s appeal to logistics firms (see below). In addition, it has allowed businesses to locate in the area, benefitting from lower property costs, whilst being able to access the wider demand opportunities generated by nearby urban areas such as Sheffield, Rotherham and Nottingham;

- Development of large employment sites along the M1 corridor has supported the emergence of Bolsover as a logistics and distribution location. Stakeholder recognised that growth in the logistics and distribution sector has driven a significant take-up of land in the District, whilst generating only modest levels of employment;

- The proposed redevelopments of Coalite (to include new industrial premises as part of a wider mixed-use development) was considered by stakeholders to represent a key opportunity for the District;
The strategic employment site at Markham Vale was also considered by stakeholders to constitute an important local economic asset, with strong potential to attract new investment and business growth opportunities to the District. Whilst the majority of the site is located in Chesterfield, Markham Vale North is situated in the west of the Borough (along the M1 corridor) and offers the potential to attract new investment and employment opportunities;

Challenges

- Consultees suggested that whilst Bolsover’s proximity to more significant economic centres such as Sheffield, Nottingham and Derby presents opportunities to compete for any overspill in demand, it also gives rise to issues of perception. It was considered that Bolsover is perceived as a relatively ‘low ranking’ economic centre within the regional context;
- The existing road infrastructure in the District represents a substantial constraint to people moving from one sub-area to the next, which reduces the flexibility of the local labour force. Clowne, in particular, was identified as an example of a local centre in Bolsover that is inhibited by poor road links, discouraging local residents from travelling beyond their local area for employment opportunities;
- Stakeholders indicated a degree of dissatisfaction amongst the local businesses with respect to the availability of commercial premises. In particular, a perceived shortage of good quality office space was identified. It was suggested that this has had the effect of driving some local businesses outside the District to find suitable commercial premises. Whilst recognising that the Bolsover office market is relatively small, stakeholders highlighted a need to ensure a suitable provision of office space is available to: support the needs of indigenous businesses; and ensure that inward investment opportunities are not lost due to an unsuitable provision of office space in the market.

Growth Scenarios

- Stakeholders acknowledged that the level of demand implied by a continuation of past take-up rates is significantly higher than the requirements generated by the labour demand and labour supply scenarios. It was considered that the relatively small difference between the labour demand and supply scenarios could be viewed as an indication that they may provide a helpful starting point for assessing indigenous demand;
- Notwithstanding the above, stakeholders also recognised that any assessment of indigenous need should be viewed as a minimum requirement and that there may be merit in providing additional flexibility to enable Bolsover to pursue inward investment opportunities as they arise. In order to do so – and mindful of the District’s previous successes in relation to retail logistics – the importance of large, readily available, well located sites was highlighted; and
It was acknowledged that the past take-up scenario reflects levels of development activity that were achieved with the support of significant public sector investment to bring sites forward. Given the current funding landscape, stakeholders advised that a degree of caution may be necessary and that planning exclusively on the basis of past take-up could risk giving rise to an oversupply of land to 2033.

Sawpit Lane Industrial Estate

The initial preferred route of HS2 (Phase 2) passes through Sawpit Lane Industrial Estate, located to the east of Tibshelf. Should HS2 proceed on this basis, it would result in the loss of the industrial estate, which is estimated to comprise of 11.6ha of allocated employment land.

In a bid to better understand the potential impact of HS2 and how the District’s Local Plan might respond – in employment land terms – to the proposals, a bespoke business survey was sent to businesses on the estate. This was supplemented by a combination of desk-based research and consultation with locally active commercial agents.

Overview

The estate is characterised by industrial units that appear to date from the 1970’s/1980’s and is understood to be fully occupied.

An analysis of VOA data shows that the estate comprises of 15 hereditaments, collectively providing 37,070sq.m of B class floorspace. The vast majority of this space is accounted for by two premises:

- 15,640sq.m of space occupied by SAPA UK Ltd. Originally a Gloucester-based business, SAPA is now part of SAPA and Hydro – a multinational organisation headquartered in Oslo. The firm specialises in aluminium fabrication and finishing and has five facilities across the UK (Gloucester, Cheltenham, Redditch, Tibshelf and Birtley)\(^1\); and

- 13,965sq.m of space occupied by Wanzl, a German-owned multi-national supplying shopping trolley products to the retail industry. It is understood that Wanzl’s UK operations are based in Warwick. Wanzl is a relatively new business to Bolsover, with the firm occupying premises on Sawpit Lane in 2011 in order to supplement other storage and distribution operations elsewhere in the UK\(^2\).

In addition, there are three more modestly sized units on the estate:

- 2,030sq.m of space occupied by Apex Insulations Ltd, suppliers of insulation and associated products to the construction industry. It is understood that Apex’s only premises are on the Sawpit Lane Industrial Estate;

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• 1,975 sq.m of space occupied by Adelphi Precision Ltd, a Derbyshire-based business that has previously occupied space in Chesterfield and Stonebroom. Adelphi is a highly specialised engineering company with customers including Formula 1 motorsport teams; and

• 1,680 sq.m of space occupied by Subframes UK Ltd. Subframes manufacture welded cavity closures for the construction industry. It is understood that Subframes’ only premises are on the Sawpit Lane Industrial Estate.

7.31 The ten remaining hereditaments on the estate are all small, with each one averaging approximately 170 sq.m in size.

Business Survey

7.32 Eight businesses located on the estate were identified by BDC Officers and invited to participate in the business survey. Two completed surveys were returned to NLP. This represents a 25% response rate; however, the low number of responses in absolute terms means that any conclusions emerging from the exercise must be interpreted with a degree of caution.

7.33 Participating businesses were asked to consider their likely commercial premises strategy, in the event that they were displaced from the Sawpit Lane Industrial Estate as a result of the development of HS2 (Phase 2). Both participants indicated a preference to move into factory or workshop space and to remain on an industrial estate (rather than occupying a single, stand-alone site). In addition, participants highlighted that the following issues are likely to be particularly important in influencing the selection of any alternative location:

• Cost of premises;
• Quality of premises;
• Access to the road network; and
• Minimising disruption to staff.

7.34 Interestingly, whilst the respondents highlighted the need to retain existing staff as a key consideration, neither expressed a preference to remain within Tibshelf and the immediately surrounding area. Rather, one participant indicated that they would seek premises elsewhere in Bolsover District (but outside of Tibshelf), whilst the other cited a preference to move outside of Bolsover District altogether (with Holmewood Industrial Estate in North East Derbyshire District, near Chesterfield, identified as the ideal location).

Implications for Bolsover

7.35 It is understood that construction on HS2 (Phase 2) is not currently anticipated to commence until 2022. As such, it is likely to be quite some time before the operational response of each occupier to any potential displacement (and the land and premises requirements that flow from these) becomes clear. Moreover, it would appear that there is unlikely to be a pressing need for
occupiers to vacate the site in the short term. This makes it difficult to quantify with any accuracy the scale of any compensatory land that may be required.

7.36 This is further compounded by the fact that the majority of floorspace on the estate is occupied by two businesses that are ultimately in foreign ownership. Neither business took part in the business survey. However, both of the organisations that did participate classified themselves as single, independent operations. As such, one might reasonably expect these firms to be more likely – or at the very least, as likely – to remain within the local area when compared to a business owned by a parent company located elsewhere in the UK or elsewhere in Europe (such as Wanzl and SAPA UK Ltd). That these single, independent organisations have expressed a preference to locate beyond Tibshelf, whilst also highlighting the importance of retaining their existing workforce, makes it difficult to discount the possibility that other businesses displaced from Sawpit Lane could also consider an area of search extending beyond Tibshelf.

7.37 It should also be noted that the responses received were from businesses occupying small and medium-sized premises on the estate. As discussed above, almost 80% of the floorspace at Sawpit Lane is accounted for by two businesses; SAPA UK Ltd and Wanzl. Clearly, whether these businesses decide to remain in Bolsover has a significant bearing on the quantum of employment land required to accommodate those firms displaced by HS2. Whilst it is not possible to speculate on how SAPA and Wanzl may respond to such an eventuality, it is noted that in both instances the decision is likely to be influenced – at least in part – by senior individuals based elsewhere in the UK or beyond. In such circumstances, the risk of alternative locations beyond Bolsover’s boundaries being considered may increase.

7.38 The factors considered above would appear to indicate that Bolsover is unlikely to retain all of the businesses currently located on Sawpit Lane in the event that those firms are displaced due to HS2. However, there is a clear risk that a failure to allocate enough land to accommodate all the displaced businesses could make it difficult for firms to find alternative sites, thereby pushing them to locations outside of the District.

7.39 In the short term, it is recommended that BDC should be proactive in liaising with the occupiers of Sawpit Lane in order to establish the lines of communication for regular dialogue. This will enable the Council to better understand occupiers’ business plans as they emerge and evolve over time, whilst also ensuring that the authority is aware of any changes in vacancy rates on the estate. This dialogue should be maintained until – and potentially beyond – such time as the occupiers have relocated to alternative premises (should this prove necessary).

7.40 The engagement process should be used – at least in part – to maintain or enhance relationships between the businesses at Sawpit Lane and BDC’s Economic Development Officers. This need not be limited to discussions related specifically to the HS2 proposals. Strong relationships between occupiers and the local authority’s economic development function could help
to maximise the number of displaced businesses that choose to remain in Bolsover (subject to the availability of suitable land and premises).

7.41 It should be noted that the forecast requirements for employment land modelled in Section 9.0 of this document do not include any specific allowance for the provision of land to offset the potential closure of Sawpit Lane. However, the issue has – in more general terms – influenced the process of reconciling the range of requirements implied by the various modelled scenarios in order to identify a preferred requirement for the District over the period to 2033 (paragraph 9.88 onwards).

7.42 Given that the analysis presented above does not appear necessarily to point towards the need for a single compensatory allocation, this is considered the appropriate response. The business survey results and market intelligence appear to suggest that occupiers would be willing to consider an area of search beyond Tibshelf, with the precise geographical extent varying in response to particular business needs and other strategic considerations.

7.43 Provided that the rate of take-up does not outstrip the supply of employment land in Bolsover, which is considered unlikely, it is considered that scope exists within Bolsover’s land portfolio to accommodate any displaced businesses that may wish to remain within the area. Clearly, the likelihood of such a scenario emerging reduces further in the event that BDC chooses to pursue a portfolio more closely aligned within the upper end of the preferred range of requirements (considered in Section 9.0).

7.44 Ensuring that any relocating businesses can be accommodated is likely, however, to require appropriate advanced planning, that responds to the greater clarity regarding the needs and locational preferences of occupiers that is anticipated to emerge over time. It may be appropriate for BDC to work with the agents or developers responsible for taking forward other employment sites in the District, in order to better understand how the phasing of development could potentially dovetail with any proposals to decant businesses from Sawpit Lane. Presenting an identified and co-ordinated solution of this nature to occupiers could again help to increase business retention rates, although it must be recognised that occupiers should be free to consider alternative solutions that may better fit their particular business needs.

63 It should be noted that whilst the demand forecasting outlined earlier in this report includes an allowance for the replacement of losses, this is not intended to compensate for the potential loss of Sawpit Lane in its entirety. The losses data underpinning the demand forecasts is characterised by small scale losses on estates throughout the District and it has been assumed that this trend will continue. This is a separate issue to the (potential) wholesale loss of Sawpit Lane as a consequence of HS2.
8.0 Growth Sectors

8.1 This section gives further consideration to those sectors of the economy that could be expected to drive growth over the Plan period. Much of the analysis presented draws upon the desk-based research and consultation exercises summarised in the preceding sections.

Future Potential

Competitive Sectors

8.2 A useful starting point for understanding those sectors that might be expected to deliver strong future growth is the Council’s Economic Development and Housing Strategy (2015-2020). The Strategy identifies the existence of five ‘Competitive Sectors’ within Bolsover, as outlined below, and suggests that the growth of these sectors could be expected to outperform the District’s economy as a whole. It is understood that the sectors have been identified on the basis that they are strongly represented within the local area:

- Wholesale and Retail;
- Manufacturing;
- Transport & Storage;
- Construction;
- Information & Communication (knowledge-based activity); and
- Energy & Water.

Recent Growth Performance

8.3 It is recognised that it is helpful to understand the relative representation of sectors in employment terms (as above) in understanding the growth potential of a local economy. This is because an over-representation can often be as a consequence of some form of inherent competitive advantage.

8.4 Such analysis, however, is relatively static. As such, it is often instructive to supplement it with an understanding of the recent growth performance of sectors. Table 8.1 is based upon analysis undertaken by NLP (using data from Experian). It uses location quotient analysis to identify those sectors that are over and under-represented locally in employment terms. In addition, it takes into account the level of employment growth observed in Bolsover across each sector (over the period 2000-2015) relative to growth rates at the East Midlands level.

8.5 Those sectors at the top of the list in each quadrant are those which have recorded the highest nominal growth, whilst those with asterisks are those which have actually recorded a decline in jobs (e.g. a sector is categorised as ‘high growth’ even if it has recorded a decline in jobs, provided the rate of decline was less than that experienced regionally).
Table 8.1  Economic Sectors in Bolsover by Size and Employment Growth Performance

<table>
<thead>
<tr>
<th>High Representation, Low Growth</th>
<th>High Representation, High Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>n/a</td>
<td>Utilities (+2,175% growth, 2000-2015); Technology (+1,050%); Other Business Services (+296%); Professional Services (+288%); Transport &amp; Storage (+219%); Construction (+200%); Wholesale (+85%); Education (+34%); Extraction &amp; Mining (-11%)<em>; and Manufacturing (-21%)</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Low Representation, Low Growth</th>
<th>Low Representation, High Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health &amp; Care (+15.2%); Agriculture (-12.5%); Accommodation &amp; Food (+10%); and Arts &amp; Entertainment (+9%.)</td>
<td>Public Administration (+288%); Real Estate (+200%); Publishing &amp; Broadcasting (+100%); Retail (+65%); and Finance, Insurance &amp; Pensions (+50%);</td>
</tr>
</tbody>
</table>

Source: Experian / NLP analysis

8.6 The top right quadrant of the table shows those sectors with a high representation of employment and that have outperformed the regional average with respect to recent growth. Of particular relevance in understanding the growth potential of the District are those that appear to be on an upward trajectory - i.e. those that have recorded positive growth in employment numbers. This includes sectors such as: utilities, technology, other business services, professional services, transport & storage, construction, wholesale and education.

8.7 The bottom right quadrant of the table contains those sectors that are currently under-represented but have experienced strong growth over the past decade. This highlights that employment in public administration, real estate, publishing & broadcasting, retail and finance, insurance & pensions has increased significantly over the period.

Econometric Forecasts

8.8 The employment forecasts that underpin the demand forecasting work undertaken as part of this study provide a further, alternative perspective on the District’s growth potential. The forecasts are discussed in greater detail in Section 9.0. It should be recognised that both sets of figures have their limitations (as outlined in Section 9.0).

Oxford Economics Baseline Forecasts

8.9 The baseline economic modelling from Oxford Economics (2015) anticipates that the five sectors listed below will make the largest absolute contributions to employment growth in Bolsover over the Plan period. It is also noted that all
five sectors are forecast to grow at a faster proportionate rate than the Bolsover economy as a whole (11%):

- Administrative & Support Services: 1,540 additional jobs (a growth rate of 31%);
- Construction: 785 additional jobs (a growth rate of 24%);
- Professional, Scientific & Technical Activities: 715 additional jobs (a growth rate of 32%);
- Information & Communication: 480 additional jobs (a growth rate of 24%); and
- Health & Social Work: 360 additional jobs (a growth rate of 13%).

As discussed in Section 3.0, analysis of the Oxford Economics past trend data identifies a significant discontinuity in the job growth figures recorded with respect to professional, scientific & technical activities. This suggests that the growth performance of this sector could be overstated.

The Oxford Economics forecasts project strong growth in the sector over the period to 2033. This would appear to be at odds with the analysis considered from a range of other data sources as summarised in Table 8.2. This may suggest that the strong growth in the sector underpinning the historic data is exerting an influence on the sectoral split of projected employment growth. The level of growth forecast in relation to this particular sector, however, does not appear to align with the evidence gathered through desk-based research or consultation with local agents and stakeholders.

**Policy-On (FLUTE Model) Forecasts**

At the request of Bolsover DC, the employment forecasts modelled as part of the Sheffield City Region FLUTE (Forecasting the interactions of Land-Use, Transport and Economy) model have been used to inform the EDNA.

It is understood that the FLUTE model has been commissioned by the Sheffield City Region LEP in order to provide a strategic, LEP-wide approach to planning and evaluating major investment proposals on a consistent basis. The model is underpinned by independent forecasts that take, as their starting point, the LEP aspiration to create 70,000 additional jobs across the LEP area over the period 2013-2024.

The economic forecasts developed to underpin the FLUTE model indicate that the five sectors listed below will make the greatest contribution – in absolute terms – to employment growth in Bolsover over the period to 2024:

- Logistics & Transport: 850 additional jobs;
- Business Services: 750 additional jobs;
- Financial & Professional Services: 700 additional jobs;

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64 A breakdown of each sector, by SIC classification, is provided at Appendix 5
65 Employment forecasts produced by Ekosgen
Summary

The preceding paragraphs provide an overview of potential growth sectors, drawing upon four different data sets, with the conclusions from each drawn together in Table 8.2. From this it can be seen that applying each of the four data sets in isolation gives rise to a different list of growth sectors.

Having regard to the methodological limitations underpinning a number of the data sets, it is suggested that – in identifying those sectors that might be expected to drive future growth – one can attach greater certainty to those sectors identified through an analysis of multiple data sources. Within this context, the sectors that could be considered most likely to drive growth in Bolsover over the Plan period would appear to be:

- Manufacturing;
- Wholesale, Transport & Logistics; and
- Construction.

It should be noted that this emphasis on the District as a location for industrial (as opposed to office-based) employment would appear to align with the views gathered from commercial agents and stakeholders.

Table 8.2 Summary Analysis: Potential Growth Sectors

<table>
<thead>
<tr>
<th>Economic Development &amp; Housing Strategy</th>
<th>Analysis of LQ and Growth Performance</th>
<th>OE Baseline Forecast</th>
<th>Policy-On (FLUTE) Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesale, Transport &amp; Logistics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information &amp; Communication</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy &amp; Water</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative &amp; Support Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health &amp; Social Work</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Financial & Business Services
Creative & Digital Industries

Source: NLP analysis
Key: GREEN = identified as potential growth sector  RED = not identified as potential growth sector

### Sectors with Growth Potential

8.18 The analysis presented above does not indicate the existence of any new, emerging sectors within Bolsover that could be anticipated to exert a significant influence on the future demand for employment space. Rather, it would appear that Bolsover’s aim over the Plan period should be to continue to build on the well-established sectoral strengths of the District (including manufacturing and wholesale and logistics) within an increasingly competitive environment. This is considered to be consistent with the discussions held with key local stakeholders during the stakeholder workshop facilitated by NLP as part of the EDNA process.

8.19 In addition, the analysis undertaken as part of the EDNA – both in the preceding paragraphs and in Section 3.0 – has not identified the presence of any specialist economic uses within Bolsover.

8.20 The following paragraphs provide a summary of those sectors that are considered to offer the strongest potential for future employment growth within Bolsover.

### Manufacturing

8.21 This sector includes both traditional manufacturing and higher value (advanced) manufacturing and engineering uses, with the latter relying on greater technology and skill inputs.

8.22 Growth in the manufacturing sector is expected to focus on advanced manufacturing, as identified within both the D2N2 and Sheffield City Region Strategic Economic Plans. Important factors identified for this sector are the proximity to the strategic road network, availability of skilled workers, high quality business park environments and flexible/affordable workspace.

8.23 Consultation with agents indicated relatively strong demand from this sector in Bolsover, particularly for mid-sized and larger stock for engineering firms. However, agents indicated that the majority of the built stock is currently older

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66 Creative and Digital comprises of a range of sub-sectors that would ordinarily be classified as being within the following industries: Manufacturing; Information and Communication; and Professional, Scientific and Technical. The FLUTE forecasts have been modelled in such a way as to avoid any double counting, by ‘stripping out’ the Creative and Digital sub-sectors from the figures for all other industries.
and smaller than the prime market, with a number of local occupiers looking to expand into larger, or higher specification space.

8.24 BDC’s Growth Strategy recognises the importance of manufacturing as a key employment sector, and highlights the need to strengthen the production and manufacturing base. However, potential competition from surrounding locations including the Advanced Manufacturing Park in Rotherham is considered to be strong. Whilst it is recognised that prospective sites in Bolsover can compete well on price, this is not typically a determining factor for advanced manufacturing location choices. As a result, Bolsover’s role is likely to focus primarily on indigenous demand.

8.25 In order to capitalise on the potential growth of this sector, it is important that Bolsover can offer a range of high quality sites in accessible locations. The ability to accommodate light industry uses in particular, will be an important factor in capturing advanced manufacturing firms and potential spin out activity from elsewhere in the wider region.

**Wholesale, Transport and Logistics**

8.26 Key locational factors for wholesale, transport and logistics activities include the availability of large, low cost sites and premises, whilst access to the strategic road network is critical.

8.27 Consultation with local agents revealed that over the last 20 years, demand from this sector had largely been driven by the delivery of buildings on sites at, or very close to the motorway junctions (e.g. Barlborough Links and Castlewood). A notable exception to the dominance of the M1 corridor in Bolsover has been the development of the 45 ha Brook Park scheme in Shirebrook, which is home to Sports Direct’s national distribution centre. The consensus of the market, however, is that such a letting is not typical of the market, which is heavily driven by direct access to a strategic road network.

8.28 Demand for large scale industrial sites across Bolsover is considered to be strong, with a shortage of available sites. The Markham Vale North scheme is considered to present a key opportunity, capitalising on the success of Markham Vale East in Chesterfield. However, it is also recognised that operators in the wholesale, transport and logistics sectors are generally footloose. As such, in order to compete with sites in Chesterfield, Ashfield etc. effectively, Bolsover will need to ensure the availability of large sites with good access to the strategic road network. Sites must be development-ready (i.e. have remediation and infrastructure in place), which may require public subsidies to support the delivery of a small number of sites in the first instance.

**Construction**

8.29 The majority of employment in the construction sector is ‘on-site’, generating little requirement for commercial premises. It does, however, create a requirement for storage depots and wholesale premises supplying construction products and materials. Such uses are particularly cost sensitive and therefore
tend to locate in areas with low values. As a result, any demand is likely to be in well established, low grade industrial locations.

8.30 The construction sector is slightly overrepresented in Bolsover relative to the regional average, accounting for just over 3,000 jobs in 2015, or 8% of the total employment base, compared to 6% across the region. Recognising this strength, BDC’s Growth Strategy identifies the construction sector as a key growth sector.

Overall, growth in construction is likely to be driven by wider employment and population growth. BDC’s Growth Strategy highlights that the latest long term population projections (up to 2030) suggest that the population of Bolsover will increase by 8,000 to 84,000 in 2030, representing a rise of 10.6%. The availability of cost effective, low grade industrial units across the District will also be required to help capture growth within Bolsover.
9.0 Future Requirements for Employment Space

9.1 This section considers future economic growth needs in Bolsover by drawing upon several methodologies that reflect the requirements of the PPG. These scenarios are used to inform the assessment of the District’s future employment land needs for office and industrial (i.e. manufacturing and distribution) uses.

Methodology

9.2 Paragraph 32 of the Housing and Economic Development Needs Assessment section of the PPG advises that “local authorities should develop an idea of future needs based on a range of data which is current and robust.” In particular, it recommends that Plan makers consider a variety of forecasting techniques:

1. Sectoral and employment forecasts and projections (labour demand);
2. Demographically derived assessments of future employment needs (labour supply techniques);
3. Analysis based on the past take-up of employment land and property and/or future property market requirements; and
4. Consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics.

9.3 Within this context a number of potential future scenarios are considered within this section in order to provide a framework for assessing future B class employment space requirements in Bolsover over the period 2015-2033. The quantitative forecasting techniques applied clearly align with items 1-3 outlined above as suggested by the PPG:

a. Baseline employment forecasts (labour demand) produced by Oxford Economics;

b. Policy-on employment forecasts (labour demand) sourced from the Sheffield City Region FLUTE model developed by Ekosgen;

c. Consideration of past take-up of employment land and property based on monitoring data collected by Bolsover DC; and

d. Estimated future growth in the local labour supply – and the jobs and employment space that this could be expected to support – having regard to population projections taken from the District’s Strategic Housing Market Assessment.

9.4 All of these approaches have their own individual strengths and limitations. As such, consideration needs to be given as to how appropriate each is to the circumstances in Bolsover. Further, to be robust, the economic growth potential and likely demand for employment space in the District needs to be assessed under a variety of future scenarios in order to reflect both lower and higher growth conditions that could arise over the study period.
It should also be noted that the ultimate judgement as to the level of need that Bolsover DC should plan for is not purely quantitative. Indeed, a number of qualitative factors must also be taken into consideration (as discussed in other sections of the report). These factors, which have been identified through an analysis of economic and market conditions – as well as through extensive consultation with local businesses, commercial agents and economic stakeholders – will influence the employment space requirements that need to be planned for and must be considered alongside the modelled scenarios (item 4 as outlined above).

a. Baseline Employment Forecast

Bolsover DC commissioned Oxford Economics, in Spring 2015, to produce a baseline forecast of employment growth in the District over the period 2015-2033\(^{67}\). These forecasts – disaggregated by sector – reflect recent trends and economic growth projections at the national and regional level. They also take into account how sectors in Bolsover have performed relative to regional growth rates in the past.

The forecasts are not constrained by labour or land supply. In addition, whilst stated government policy is considered by Oxford Economics in order to help to frame the future macroeconomic outlook, the forecasts do not take account of any: local policy interventions; planned major developments; or infrastructure changes at the local/regional level.

Econometric forecasts of this nature tend to be most reliable at the regional and national level and less so when considering local economies. This is particularly true for smaller, rural/semi-rural economies such as Bolsover. Nevertheless, they provide a valuable input by indicating the broad scale and direction of economic growth in different sectors, thereby helping to assess future land requirements.

These projections indicate an overall growth of 3,865 jobs in Bolsover over the 18 year study period – equivalent to around 215 additional jobs per annum. Table 9.1 provides a detailed sectoral breakdown of the figures.

\(^{67}\) It should be noted that the OE forecasts only extend to 2030. Projections have been extended to cover the period to 2033 by taking an average of growth rates – by sector – for the final 3 years of the OE dataset and applying these over the period to 2033.
Table 9.1  Fastest Growing and Declining Sectors in Bolsover (2015-2033)

<table>
<thead>
<tr>
<th>SIC Sector</th>
<th>Use Class</th>
<th>Additional Jobs (2015-2033)</th>
<th>% Change (2015-2033)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative and support service activities</td>
<td></td>
<td>+1,540</td>
<td>+30.5%</td>
</tr>
<tr>
<td>Construction</td>
<td></td>
<td>+785</td>
<td>+23.6%</td>
</tr>
<tr>
<td>Professional, scientific and technical activities</td>
<td></td>
<td>+713</td>
<td>+31.6%</td>
</tr>
<tr>
<td>Information and communication</td>
<td></td>
<td>+482</td>
<td>+24.4%</td>
</tr>
<tr>
<td>Health and social work</td>
<td></td>
<td>+360</td>
<td>+13.4%</td>
</tr>
<tr>
<td>Wholesale and retail</td>
<td></td>
<td>+336</td>
<td>+6.0%</td>
</tr>
<tr>
<td>Transportation and storage</td>
<td></td>
<td>+189</td>
<td>+9.0%</td>
</tr>
<tr>
<td>Other service activities</td>
<td></td>
<td>+125</td>
<td>+11.8%</td>
</tr>
<tr>
<td>Arts, entertainment and recreation</td>
<td></td>
<td>+103</td>
<td>+28.4%</td>
</tr>
<tr>
<td>Real estate activities</td>
<td></td>
<td>+71</td>
<td>+27.2%</td>
</tr>
<tr>
<td>Accommodation and food service activities</td>
<td></td>
<td>+63</td>
<td>+4.3%</td>
</tr>
<tr>
<td>Finance and insurance</td>
<td></td>
<td>+6</td>
<td>+2.7%</td>
</tr>
<tr>
<td>Mining and quarrying</td>
<td></td>
<td>-4</td>
<td>-47.0%</td>
</tr>
<tr>
<td>Agriculture, forestry and fishing</td>
<td></td>
<td>-22</td>
<td>-8.2%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td>-107</td>
<td>-3.4%</td>
</tr>
<tr>
<td>Public administration and defence</td>
<td></td>
<td>-133</td>
<td>-16.3%</td>
</tr>
<tr>
<td>Utilities</td>
<td></td>
<td>-182</td>
<td>-16.7%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td></td>
<td>-460</td>
<td>-10.2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>+3,864</strong></td>
<td><strong>+10.7%</strong></td>
</tr>
</tbody>
</table>

Source: Oxford Economics (Spring 2015) / NLP analysis
Key: GREEN = B class sector  ORANGE = Part B class sector  RED = Non B class sector

This analysis indicates that the strongest growth in employment over the period to 2033 is anticipated to be observed in: administrative and support service activities; construction; professional, scientific and technical activities; and information and communications. Sectors forecast to experience the largest employment losses over the period include: manufacturing; utilities; and public administration and defence.
9.11 The total employment change anticipated in Bolsover under the baseline scenario is shown in Table 9.2, alongside the forecast job growth in each of the B class sectors. This includes an allowance for jobs in other non-B class sectors that generally use office or industrial space (Appendix 3).

Table 9.2 Baseline Forecast Employment Change in Bolsover (2015-2033)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/B1b)</td>
<td>5,254</td>
<td>6,371</td>
<td>1,117</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>6,458</td>
<td>6,143</td>
<td>-315</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>3,386</td>
<td>3,629</td>
<td>243</td>
</tr>
<tr>
<td><strong>Total B Class Jobs</strong></td>
<td><strong>15,098</strong></td>
<td><strong>16,144</strong></td>
<td><strong>1,045</strong></td>
</tr>
<tr>
<td><strong>Total Jobs (All Sectors)</strong></td>
<td><strong>36,171</strong></td>
<td><strong>40,035</strong></td>
<td><strong>3,864</strong></td>
</tr>
</tbody>
</table>

Source: Oxford Economics / NLP analysis

9.12 These figures indicate low overall net job gains in the B class sectors (1,045 jobs) within Bolsover to 2033. This represents a growth rate of 6.9% over the period. This is particularly modest when considered in the context of historic performance, as discussed later. Indeed, B class jobs increased by more than 6,600 (a growth rate of 62%) between 2000 and 2015 – a period that included the economic downturn of 2008/9 and the subsequent legacy impacts.

9.13 The baseline forecast anticipates that the majority of B class growth will occur in office-based sectors, with a considerably smaller increase in warehousing and distribution. Manufacturing jobs are projected to contract. This does not appear to reflect the market outlook put forward by local commercial agents, who anticipate that growth will primarily be driven by demand from industrial (factory and warehousing) occupiers – a view that would appear to be supported by details of current planning permissions provided by BDC and assessed elsewhere within this EDNA.

9.14 Total job growth within the District of 3,864 is forecast under the baseline scenario. As such, the majority of employment growth (2,819 jobs) is expected to occur in sectors that would not traditionally generate a requirement for B class floorspace. These sectors may also require additional floorspace in order to accommodate increases in employment over the period to 2033 (which may include some conventional office space). However, whilst some consideration is given to the growth prospects of non-B class sectors in Section 10.0, it should be noted that the spatial implications of this growth – in land use terms are considered using different methodologies and other forms of technical evidence.

9.15 The total GVA growth associated with the baseline employment forecasts for Bolsover equates to a rise of 49.8% between 2015 and 2030 – or an average
of 2.7% per annum. In absolute terms, this is forecast by Oxford Economics to correspond to an increase of £561m over the period.

9.16 The projected net increase of 1,045 B class jobs (2015 to 2033) which underpins this estimate of future employment space need is equivalent to an average of just 60 additional B class jobs per annum. This is significantly lower than the B class growth of 275 jobs per annum achieved in Bolsover during the period 1991 to 2015 (Figure 9.1). Indeed, it accounts for just 22% of the annual increases observed historically.

9.17 It should be noted that much of the difference (115 jobs per annum) is attributable to a slower level of assumed growth in relation to office jobs moving forwards. As previously discussed, however, a detailed interrogation of the underlying data appears to suggest that historical office growth in Bolsover may have been overstated. Any downward revision in past trends as a result would serve to narrow the gap between past and projected future growth.

9.18 Indeed, removing the increase of 2,300 jobs recorded in the ‘professional, scientific and technical activities’ sector between 2007 and 2008 would see historic office jobs growth fall to approximately 80 jobs per annum. Such a figure would align relatively closely with the level of future job growth projected under the baseline scenario (60 jobs per annum).

Figure 9.1  Annual Job Growth Implied by Baseline Forecast

Total workforce job growth is also projected, by Oxford Economics, to be significantly lower than historic trends over the period 2015 to 2033. Whereas total employment increased by an average of 610 new jobs per annum between 1991 and 2015, growth of just 215 new jobs per annum is forecast over the study period. This equates to just 35% of past trends.
On the basis of past performance, the baseline job growth scenario would appear to represent a very conservative estimate of the District’s employment growth potential.

The growth in B class employment anticipated under the baseline forecast, as discussed above, has been converted into net future employment space requirements by applying the following average employment densities have been applied to the job forecasts:

- **Offices**: 1 job per 12.5sq.m. for general office space;
- **Industrial**: 1 job per 43sq.m. as an average across B1c and B2 uses; and
- **Warehousing/Distribution**: 1 job per 65sq.m. for general, smaller scale warehousing (assumed to account for 60% of future space) and 1 job per 74sq.m. for large scale, lower density units (assumed to account for 40% of future space).

These assumptions are based upon the latest HCA/OffPAT guidance on employment densities, published in 2010\(^{68}\). The guidance takes into account recent trends relating to the changing use of employment space, with the main change being the more efficient use of office space through hot-desking and flexible working.

An allowance of 10% is added to all floorspace requirements to reflect normal levels of market vacancy in employment space. Where a reduction in employment is forecast (e.g. manufacturing) the associated negative floorspace has been halved. This reflects the fact that whilst there may be ongoing manufacturing job losses, it does not necessarily and automatically follow that all of the associated existing employment land will be lost.

Indeed, whilst manufacturing employment in Bolsover declined by 50 jobs over the period 1999 to 2015, demand for new employment space in the District was still observed during this period. Take-up data provided by Bolsover DC, for instance, indicates that 26.86ha of gross additional B1c/B2 space was constructed in the District between 1999/00 and 2014/15. It is, however, recognised that this was – at least in part – offset by losses of older manufacturing space to non-B class uses, giving rise to a net take-up of 16.32ha\(^{69}\).

Additionally, the baseline forecast produced by Oxford Economics projects that the GVA generated by the manufacturing sector within Bolsover will increase by £90m between 2015 and 2030. This would indicate that the District’s manufacturing sector will continue to perform well in terms of economic output, perhaps in part through increased automation and the adoption of more efficient production techniques. As such, it is considered unlikely that the forecast decline in manufacturing employment will give rise to a commensurate reduction in demand for B1c/B2 space.

\(^{68}\) Based upon the HCA/OffPAT Employment Densities Guide (2010) and converted to Gross External Area and total workforce jobs by NLP

\(^{69}\) This includes a 33% allowance for the 3.75ha of general (B1/B2/B8) B class land lost
Table 9.3  Baseline Employment Forecast: Net Employment Space Requirements in Bolsover (2015-2033)

<table>
<thead>
<tr>
<th></th>
<th>Floorspace (sq.m.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/B1b)</td>
<td>15,360</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>-6,765</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>18,800</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>27,400</strong></td>
</tr>
</tbody>
</table>

Source: NLP analysis

b. Policy-On Employment Forecast

In addition to the baseline scenario described above, the employment space implications associated with a policy-on forecast have also been considered by NLP. At the request of Bolsover DC, the employment forecasts modelled as part of the Sheffield City Region FLUTE (Forecasting the interactions of Land-Use, Transport and Economy) model have been used to underpin the scenario.

It is understood that the FLUTE model has been commissioned by the Sheffield City Region LEP in order to provide a strategic, LEP-wide approach to planning and evaluating major investment proposals on a consistent basis.

The FLUTE model is underpinned by independent forecasts commissioned by the Sheffield City Region LEP. It is understood that the forecasts take, as their starting point, the LEP aspiration (as outlined in the SEP) to create 70,000 additional jobs across the LEP area over the period 2013-2024. The forecasts were commissioned to consider the likely disaggregation of this level of job growth (by sector and local authority).

In addition, it is understood that the FLUTE modelling work assumed that the target of 70,000 jobs would be delivered through a general and broad-based improvement in local economic conditions in the event that the Sheffield City Region LEP is allocated the funding, freedoms and flexibilities that the organisation requested in the SEP and will continue to request in subsequent funding rounds.

The employment forecasts generated through the FLUTE model anticipate that 4,100 jobs could be created within Bolsover District between 2013 and 2024 under such a scenario. Given that the forecasts only cover the period 2013-2024, it was necessary to adjust these in order to derive an estimate of job growth over the period 2015-2033. In order to do so, NLP annualised employment change by sector for Bolsover as forecast by the FLUTE model and projected this forward, on a pro-rata basis. This gives rise to a projected increase of 6,710 jobs over the study period.

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70 Employment forecasts produced by Ekosgen
9.31 Given that the original FLUTE figures are based upon a general and broad-based uplift in economic performance (as opposed to project-based assumptions where impacts are less likely to follow a linear trajectory) such an approach is considered reasonable. Clearly, however, the results must be interpreted with a degree of caution.

9.32 Table 9.4 provides a summary of projected employment growth over the period 2015-2033. The figures have been derived by NLP – using the methodology described in the preceding paragraphs – and are underpinned by the FLUTE job growth forecasts to 2024.

Table 9.4  Projected Employment Change by Sector (2015-2033)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Logistics &amp; Transport</td>
<td>GREEN</td>
<td>+850</td>
<td>+1,390</td>
</tr>
<tr>
<td>Business Services</td>
<td>GREEN</td>
<td>+750</td>
<td>+1,225</td>
</tr>
<tr>
<td>Financial &amp; Professional Services</td>
<td>ORANGE</td>
<td>+700</td>
<td>+1,145</td>
</tr>
<tr>
<td>Creative &amp; Digital Industries</td>
<td>GREEN</td>
<td>+400</td>
<td>+655</td>
</tr>
<tr>
<td>Advanced Manufacturing</td>
<td>GREEN</td>
<td>+350</td>
<td>+575</td>
</tr>
<tr>
<td>Retail</td>
<td>RED</td>
<td>+300</td>
<td>+490</td>
</tr>
<tr>
<td>Construction</td>
<td>GREEN</td>
<td>+300</td>
<td>+490</td>
</tr>
<tr>
<td>Sport, Leisure &amp; Tourism</td>
<td>RED</td>
<td>+275</td>
<td>+450</td>
</tr>
<tr>
<td>Health</td>
<td>RED</td>
<td>+180</td>
<td>+325</td>
</tr>
<tr>
<td>Low Carbon</td>
<td>GREEN</td>
<td>+180</td>
<td>+325</td>
</tr>
<tr>
<td>Other</td>
<td>RED</td>
<td>+150</td>
<td>+245</td>
</tr>
<tr>
<td>Education</td>
<td>RED</td>
<td>+75</td>
<td>+125</td>
</tr>
<tr>
<td>Public Administration</td>
<td>ORANGE</td>
<td>-200</td>
<td>-325</td>
</tr>
<tr>
<td>Medium-Low Tech Manufacturing</td>
<td>GREEN</td>
<td>-250</td>
<td>-410</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>+4,100</strong></td>
<td><strong>+6,710</strong></td>
</tr>
</tbody>
</table>

Source: FLUTE Model / NLP Analysis

Key: GREEN = B class sector  ORANGE = Part B class sector  RED = Non B class sector

9.33 From the table it can be seen that the FLUTE model assumes that the strongest growth in employment over the period to 2033 will be observed in:

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71 It should be noted that the analysis presented under the policy-on scenario is based upon the sectors defined within the FLUTE model. These differ from the SIC sectors used to underpin the baseline scenario.
logistics and transport; business services; financial and professional services; creative and digital industries; and advanced manufacturing. The model also assumes a decline in the number of jobs within: public administration; and medium-low tech manufacturing\(^{72}\).

The total employment change anticipated to occur in Bolsover under the Policy-On scenario is shown in Table 9.5. This has also been disaggregated for each of the B Class sectors.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/B1b)</td>
<td>5,254</td>
<td>7,876</td>
<td>2,622</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>6,458</td>
<td>7,098</td>
<td>640</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>3,386</td>
<td>3,992</td>
<td>606</td>
</tr>
<tr>
<td><strong>Total B Class Jobs</strong></td>
<td><strong>15,098</strong></td>
<td><strong>18,966</strong></td>
<td><strong>3,868</strong></td>
</tr>
<tr>
<td><strong>Total Jobs (All Sectors)</strong></td>
<td><strong>36,171</strong></td>
<td><strong>42,880</strong></td>
<td><strong>6,709</strong></td>
</tr>
</tbody>
</table>

Source: FLUTE model / NLP analysis

These figures assume a much higher growth in B class employment (3,868 jobs) than the level forecast under the OE baseline (1,045), which is in part a function of the higher total level of job growth projected. However, the FLUTE model also assumes that B class jobs will account for a far larger proportion of total growth (58%) in comparison with OE (27%).

As with the OE baseline forecast, the Policy-On modelling assumes that the majority of B class growth will occur in office-based sectors. In contrast, however, the Policy-On figures anticipate growth (albeit at a more modest level) in both the manufacturing and warehousing/distribution sectors. Whilst the more positive outlook in respect of manufacturing jobs would appear to better align with the view of local agents and stakeholders (as noted above) regarding Bolsover’s future role, the proportionate distribution of jobs – with a strong emphasis on office-based employment growth – does not.

As outlined above, the job figures generated under the Policy-On scenario are more bullish than those contained within the baseline forecast, as is perhaps to be expected. Notwithstanding this, the growth in B class employment assumed under the Policy-On scenario is – at 26% - considerably lower than the 78% growth observed between 1991 and 2015.

The projected net increase of 3,868 B class jobs (2015 to 2033) which underpins the estimate of future employment space needs derived under this scenario, is equivalent to an average of 215 additional B class jobs per annum.

\(^{72}\) Appendix 6 provides a summary of the SIC classifications included within each sector of the FLUTE model.
This compares to average growth of 275 additional B class jobs per annum achieved in Bolsover over the period 1991 to 2015 (see Figure 9.2). The Policy-On scenario therefore assumes annual growth in B class employment that corresponds to 78% of the levels observed historically.

9.39 As previously discussed, an analysis of past trends does suggest that growth in office-based jobs may have been overstated. Removing the large increase in 'professional, scientific and technical activities' sector observed between 2007 and 2008 would see historic office jobs growth fall to approximately 80 jobs per annum. This is lower than the level of growth in office jobs projected under the Policy-On scenario.

9.40 Adjusting the figures to take account of the above, would result in the projected future B class job growth (200 per annum) being relatively well aligned with past trends (an estimated 180 per annum).

Figure 9.2 Annual Job Growth Implied by Policy-On Forecast

Total workforce job growth over the period 2015-2033 is also anticipated, under the Policy-On scenario, to be significantly lower than historic trends. Whereas total employment increased by an average of 610 new jobs each year between 1991 and 2015, growth of just 370 is projected over the study period. This equates to 61% of past trends.

9.41 Cognisant of the above, the Policy-On scenario would appear to represent a conservative estimate of the District’s total employment growth potential when benchmarked against past trends. It is, however, recognised that the scenario appears to align relatively well with past trends in relation to B class job growth.
In addition it assumes a higher level of employment growth (and a greater emphasis on B class employment) than the OE baseline forecast.

The growth in B class employment anticipated under the Policy-On scenario has been converted into net future employment space requirements using the same methodological approach outlined in respect of the baseline scenario. The results of this exercise are summarised in Table 9.6.

Table 9.6  Policy-On Employment Forecast: Net Employment Space Requirements in Bolsover (2015-2033)

<table>
<thead>
<tr>
<th></th>
<th>Floorspace (sq.m.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/B1b)</td>
<td>36,060</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>30,255</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>45,765</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>112,080</strong></td>
</tr>
</tbody>
</table>

Source: NLP analysis

**c. Past Take-Up Rates**

Because they reflect demonstrable market demand, as well as development patterns ‘on the ground,’ long term take-up rates can – in some instances – provide a reasonable basis for estimating future land needs. Completions data spanning a period of approximately ten years or more should even out demand fluctuations over a business cycle. As such, they would ordinarily provide a reasonable starting point for estimating future needs in the event that supply has not been unduly constrained over the period.

Whereas employment forecasts express growth in net terms, analysis of past take-up takes into account development that offsets the redevelopment of employment sites and the recycling of sites.

Monitoring data on past take-up of B class uses in the District over the period 1999/2000 to 2014/15 (inclusive) was provided by Bolsover DC. Whilst all data was provided on the basis of hectares of land, this has been converted by NLP – using the same plot ratios detailed later in this section – into floorspace. This has been done to ensure that the employment space estimates generated under the past take-up scenario are directly comparable with those derived using the labour demand and labour supply techniques considered elsewhere in this section.

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73 It should be noted that this data has not been independently verified or interrogated by NLP
### Table 9.7 Past Take-Up of Employment Space in Bolsover (1999/00-2014/15)

<table>
<thead>
<tr>
<th></th>
<th>Total Net Completions (sq.m.)</th>
<th>Total Gross Completions (sq.m.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/B1b)</td>
<td>72,680</td>
<td>78,760</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>58,360</td>
<td>107,440</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>267,840</td>
<td>274,400</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>398,880</strong></td>
<td><strong>460,600</strong></td>
</tr>
</tbody>
</table>

Source: Bolsover DC / NLP analysis

One view of future growth in Bolsover could therefore be to simply assume that past development rates carry on into the future. If it were assumed that past net completion rates were to continue over the 18 year study period, this would equate to an overall increase of 448,705 sq.m of employment space, comprising of:

- 81,755 sq.m of office (B1a/B1b) space;
- 65,630 sq.m of manufacturing (B1c/B2) space; and
- 301,320 sq.m of distribution and warehousing (B8) space.

The take-up data underpinning the figures presented above includes a small number of large development schemes that manifest themselves in two distinct peaks in the District’s annual take-up rate: 12.4 ha taken by Tesco on Barlborough Links (2004/5); 9.8 ha taken by Sports Direct on Brook Park (2004/5); and 17.73 ha taken by the Co-operative Group on Junction 28 (2012/13).

Instances of ‘exceptional’ development activity can sometimes pose a risk in respect of inflating estimated demand within a local authority area. Under such circumstances, it can be appropriate to strip out the land take associated with the relevant schemes. However, for the purpose of this assessment no adjustments have been made to the take-up data having regard to a number of factors, including:

- Three large retail warehousing schemes were developed out over the period from 2004/05, including a large, post-recession development on Junction 28. Whilst a single scheme could be viewed as ‘exceptional’ the District’s success in attracting these occupiers would indicate that the area holds some intrinsic appeal to the sector and could, all other things being equal, hope to attract further investments of this scale and nature over the Plan period;
- Consultation with commercial agents active in the area indicated that the District is likely to remain an attractive location for logistics operators, subject to the availability of suitable sites and premises, although it is recognised that competition may be greater from the adjoining authorities; and
Bolsover’s ability to accommodate such demand is unlikely to be constrained by supply-side issues in the short term, with large sites at Markham Vale (12.2ha), Castlewood Business Park (10.67ha) and the former Armstrong Colliery (10.05ha) benefitting from extant planning permissions for B class development.

As can be seen from Table 9.10, the net floorspace requirements implied by a continuation of past levels of development activity are significantly higher than those derived through the application of labour demand and labour supply techniques.

Using standard ratios of jobs to floorspace for the different B class uses (as outlined in relation to the baseline scenario), it is possible to estimate that this level of floorspace\(^{74}\) could be expected to accommodate 11,230 B class jobs. This is equivalent to a net average annual gain of 624 B class jobs over the Plan period and is considerably higher than the B class job growth of 442 per annum observed over the period 2000 to 2015.

d. Labour Supply Scenario

A labour supply scenario – underpinned by demographic modelling produced by GL Hearn to inform the Council’s Strategic Housing Market Assessment (SHMA) – has also been considered. These projections estimate that Bolsover’s total population will increase from 77,650 in 2015 to 84,566 in 2033. As a result, the number of economically active residents is projected to rise from 35,835 to 38,900\(^{75}\) over the same period.

This change in economically active residents has been used by NLP to estimate the level of employment space that this population change could be expected to support. NLP’s analysis also assumes that 2011-based commuting relationships are maintained over the study period and that Bolsover continues to be a net exporter of labour.

This approach reflects the most recent population projection work commissioned by Bolsover DC and provides a purely demographic driven assessment of future labour supply. The scenario presented by NLP does not consider the housing implications associated with this level of population growth.

Table 9.8 summarises the resident and workplace labour supply resulting from this scenario, which correspond to increases of 2,990 and 2,240 respectively over the period 2015 to 2033. From the workplace-based forecast, the number of B class jobs required was estimated. The methodology applied by NLP assumes that one additional job would be required for each additional worker,

\(^{74}\) A standard vacancy rate of 10% was also applied

\(^{75}\) It should be noted that estimates of economically active residents are only provided by GL Hearn to 2031. As such, NLP has assumed that the economic activity rate will remain unchanged between 2031 and 2033. This has been applied to GL Hearn’s estimate of working age population in 2033.
whilst also taking account of the existing and forecast proportion of B class relative to total jobs within the District\textsuperscript{76}.

Table 9.8 Forecast Labour Supply and Job Requirements for Bolsover (2015-2033)

<table>
<thead>
<tr>
<th></th>
<th>Total Change (2015-2033)</th>
<th>Average Per Annum (2015-2033)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident Labour Supply</td>
<td>2,990</td>
<td>166</td>
</tr>
<tr>
<td>Workplace Labour Supply</td>
<td>2,240</td>
<td>124</td>
</tr>
<tr>
<td>Office Jobs (B1a/b)</td>
<td>793</td>
<td>44</td>
</tr>
<tr>
<td>Manufacturing Jobs (B1c/B2)</td>
<td>-395</td>
<td>-22</td>
</tr>
<tr>
<td>Warehousing/Distribution Jobs (B8)</td>
<td>123</td>
<td>7</td>
</tr>
<tr>
<td><strong>All B Class Jobs</strong></td>
<td><strong>522</strong></td>
<td><strong>29</strong></td>
</tr>
</tbody>
</table>

Source: Bolsover DC / NLP analysis

This implies a need for 522 new B class jobs in Bolsover over the study period, which is equivalent to just 29 new jobs per annum. These job numbers can be translated into estimated requirements for B class employment space by applying the same standard employment densities used in the labour demand scenarios considered above, and adding a 10% vacancy allowance. Where a reduction in jobs is forecast (in this instance in relation to the manufacturing sector) the associated negative floorspace figure is halved.

Overall future employment floorspace requirements based on meeting the job needs of local workers would require 12,435sq.m of additional B class employment floorspace in the District to 2033 (Table 9.9).

Table 9.9 Net Employment Floorspace Required from Labour Supply Growth (2015-2033)

<table>
<thead>
<tr>
<th></th>
<th>Floorspace (sq.m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/b)</td>
<td>10,045</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>-7,140</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>9,530</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>12,435</strong></td>
</tr>
</tbody>
</table>

Source: NLP analysis

This labour supply-based estimate provides a useful benchmark for comparison against the labour demand-based scenarios. Based upon the population projections developed as part of the Council’s SHMA, this forecast produces a positive space requirement that is significantly lower than both the baseline and policy-on employment forecasts. The forecast space requirement

\textsuperscript{76} Based upon the Oxford Economics baseline forecast, obtained Spring 2015.
is also significantly lower than the need implied by projecting forward historic development rates.

**Net Employment Space Requirements**

Table 9.10 draws together the preceding analysis. It provides a summary of net floorspace requirements to 2033, as identified under each of the scenarios considered above.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Office Floorspace (sq. m.)</th>
<th>Manufacturing Floorspace (sq. m.)</th>
<th>Warehousing/Distribution Floorspace (sq. m.)</th>
<th>Total Floorspace (sq. m.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Baseline (OE) Job Growth</td>
<td>15,360</td>
<td>-6,765</td>
<td>18,800</td>
<td>27,400</td>
</tr>
<tr>
<td>b. Policy-On (FLUTE) Job Growth</td>
<td>36,060</td>
<td>30,255</td>
<td>45,765</td>
<td>112,080</td>
</tr>
<tr>
<td>c. Past Take-Up Rates</td>
<td>81,755</td>
<td>65,630</td>
<td>301,320</td>
<td>448,705</td>
</tr>
<tr>
<td>d. Labour Supply (SHMA)</td>
<td>10,045</td>
<td>-7,140</td>
<td>9,530</td>
<td>12,435</td>
</tr>
</tbody>
</table>

Source: NLP analysis

The forecasts reflect a wide range of potential net space requirements. For office space, this ranges between a requirement for 10,045sq.m (under the labour supply scenario) to 81,755sq.m (based upon past take-up rates). For industrial space, this ranges from 2,390sq.m (under the labour supply scenario) to 366,950sq.m (based upon past take-up rates).

**Safety Margin**

To estimate the overall requirement of employment floorspace that should be planned for in allocating sites, and to give some flexibility of provision, it is common practice to add an allowance as a safety margin (i.e. to account of factors such as delays in some sites coming forward for development).

Mindful of the relatively unconstrained land supply (in quantitative terms) within Bolsover, it is considered appropriate to apply a reasonable allowance that provides for some flexibility and reflects the fact that there may be potential delays in some of the District’s sites coming forward. However, it is important to ensure that the allowance is not over-generous, as this could give rise to an over-provision of land.

Taking the above into account, a safety margin of two years – generally recognised as the average length of time taken for a site to gain planning permission and for development to commence – is considered appropriate for Bolsover. On this basis, the margins set out in Table 9.11 were added to the
net space requirements for the relevant B class uses. The margins have been calculated on the basis of two years of net take-up.

Table 9.11 Safety Margin Allowances

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Average Annual Net Take-Up (sq.m.)</th>
<th>Safety Margin Added (sq.m.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/b)</td>
<td>4,542</td>
<td>9,084</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>3,646</td>
<td>7,292</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>16,740</td>
<td>33,480</td>
</tr>
</tbody>
</table>

Source: NLP analysis

Gross Employment Space Requirements

9.64 To convert the net requirement for employment space into a gross requirement (the amount of space to be allocated/planned for by BDC) an allowance is also typically made for some replacement of losses of existing employment space that may be developed over the Plan period for other, non-B class uses. This allowance seeks to ensure that sufficient space is re-provided to account for employment space that is anticipated to be lost in future and provides some protection against continued erosion of employment space in the District.

9.65 Clearly, however, not all losses need necessarily be replaced. Some, for instance will reflect an element of restructuring in the economy. As a result it is necessary to have regard to locally specific factors and property market dynamics.

9.66 An analysis of recent losses in Bolsover (1999/2000 to 2014/15) shows that the majority of losses have been relatively small scale. The largest area of land lost during this period was a 2.56ha site on the Berristow Lane Industrial Estate, whereas the majority of activity has occurred on sites of less than 1ha. In addition, land has been lost to a variety of uses including a variety of small residential developments) with losses dispersed across numerous settlements.

9.67 The above analysis would suggest that no individual industrial estates are coming under concerted pressure for redevelopment from non-B class uses to the extent that provision should be made for their replacement in full. As such, it is considered that allowing for the replacement of losses at 50% of historic rates is appropriate.

9.68 Losses over the period 1999/2000 to 2014/15 have averaged approximately 0.96ha per annum. This corresponds to approximately 3,858sq.m of floorspace (on the basis of a plot ratio of 0.4). Including an allowance for the replacement of losses at 50% of past rates therefore equates to some 1,929sq.m per annum over the Plan period. The resultant gross floorspace requirements incorporating this allowance (disaggregated by use class) are set out in Table 9.12 and Figure 9.3.
9.69 The range of floorspace requirements for industrial development is very wide – between 74,465sq.m and 439,020sq.m depending upon the approach used. Compared with the stock of industrial space available in 2012 (i.e. the most recent year for which consistent VOA data is available) this range would be equivalent to an increase in stock of between 10% and 59% to 2033.

Table 9.12 Gross Floorspace Requirements in Bolsover by Scenario, 2015-2033 (sq.m)

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/b)</td>
<td>27,865</td>
<td>48,560</td>
<td>94,260</td>
<td>22,550</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>20,845&lt;sup&gt;77&lt;/sup&gt;</td>
<td>65,160</td>
<td>100,530</td>
<td>27,765</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>55,975</td>
<td>82,935</td>
<td>338,490</td>
<td>46,700</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>104,685</strong></td>
<td><strong>196,655</strong></td>
<td><strong>533,280</strong></td>
<td><strong>97,015</strong></td>
</tr>
</tbody>
</table>

Source: NLP analysis

Figure 9.3 Gross Floorspace Requirements by Scenario (2015-2033)

Source: NLP analysis

<sup>77</sup> The baseline scenario assumes a decline in manufacturing jobs to 2033, as reflected in the negative net employment floorspace requirement shown in Table 9.10. However, in identifying a gross employment floorspace requirement a safety margin (based upon two years of net take-up) and an allowance for the replacement of losses (at 50% of past rates) have been applied. This gives rise to a positive gross requirement for B1c/B2 space despite a projected contraction in manufacturing jobs.

<sup>78</sup> Based on industrial stock of 747,000sq.m as recorded by the VOA for 2012.
Examining the industrial floorspace requirements in greater detail, it can be seen that the variation between the projected requirements for B1c/B2 (manufacturing) space is far less pronounced than for B8 (warehousing) premises. Indeed, whereas the labour supply scenario forecasts a requirement for 46,700sq.m of warehousing space, a projection of historic take-up rates would imply that some 338,490sq.m of space could be required over the Plan period.

For office floorspace, the range of floorspace requirements is also wide – between 22,500 and 94,260 – albeit far lower in absolute terms than that observed with respect to industrial (outlined above). Compared with the stock of space in Bolsover in 2012, this range would be equivalent to an increase in stock of between 36% and 150%.

**Estimated Land Requirement**

For each of the scenarios discussed in the preceding paragraphs, the gross floorspace requirements (by use class) have been translated into land requirements. This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates using the following assumptions:

- **Industrial**: a plot ratio of 0.4 was applied, so that a 1ha site would be needed to accommodate a footprint of 4,000sq.m of employment floorspace; and
- **Offices**: it was assumed that 80% of new floorspace would be in lower density developments with a plot ratio of 0.4 (typically observed on business park environments) with 20% in higher density town centre locations at a plot ratio of 2.0. That is not to say, necessarily, that it has been assumed that 80% of office development will occur outside of town centres. Rather, it represents an acknowledgement that some development will, whilst some development in town centres will also be at a lower density. This reflects the limited number of higher density office developments that have come forward in the District historically.

The resulting land requirements are set out in Table 9.13 and Figure 9.4

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79 Based on office stock of 63,000sq.m as recorded by the VOA for 2012
Table 9.13  Gross Land Requirements by Scenario, 2015-2033 (hectares)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Offices (B1a/b)</td>
<td>5.9</td>
<td>10.2</td>
<td>19.8</td>
<td>4.7</td>
</tr>
<tr>
<td>Manufacturing (B1c/B2)</td>
<td>5.2</td>
<td>16.3</td>
<td>25.1</td>
<td>6.9</td>
</tr>
<tr>
<td>Warehousing/Distribution (B8)</td>
<td>14.0</td>
<td>20.7</td>
<td>84.6</td>
<td>11.7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>25.1</strong></td>
<td><strong>47.2</strong></td>
<td><strong>129.5</strong></td>
<td><strong>23.3</strong></td>
</tr>
</tbody>
</table>

Source: NLP analysis

Figure 9.4  Gross Land Requirement by Scenario, 2015-2033 (ha)

Source: NLP analysis

**Sensitivity Testing**

Given the range of potential requirements implied by the different forecasting techniques considered above, it is important to test how reasonable each appears against other factors and how sensitive they are to flexing the underlying assumptions. Such sensitivity testing can help to inform a view as to how one might narrow the range in order to identify an appropriate preferred requirement for the District.
Take-Up Rates

As previously discussed, the take-up data underpinning scenarios a-d\textsuperscript{80} includes a number of developments for large, retail logistics facilities. The inclusion of these developments is considered to be appropriate having regard to the local context and the accompanying rationale is set out in detail earlier in this section. Nevertheless, it is recognised that large schemes delivered by or on behalf of organisations such as Tesco, Sports Direct and the Co-op constitute imported demand, which is potentially relatively footloose.

In order to better understand underlying employment land requirement associated with the growth of the District’s indigenous business base, therefore, it is helpful to consider the implications of stripping any such large developments out of the take-up figures. Such an approach would, assuming that all other methodological assumptions remain unchanged, result in:

- The requirement for B8 land (2015-2033) falling from 84.6ha to 34.7ha; and  
- The requirement for all B class land (2015-2033) falling from 129.5 to 79.6ha.

Replacement of Losses

Scenarios a-d, presented for consideration in the preceding paragraphs, include an allowance for the replacement of losses at 50% of past rates. This is considered to be appropriate, having regard to the scale and spatial distribution of historic losses.

Notwithstanding the above, it is helpful to understand the impact of this assumption on the overall level of forecast demand. For each of the scenarios (a-d) increasing the replacement of losses from 50% to 100% would see the total requirement increase by 8.5ha. This would see the range of requirements rise from between 23.3ha and 129.5ha to between 31.2ha and 138.0ha.

Increasing the allowance for the replacement of losses to 100% would primarily serve to increase the projected demand for B1c/B2 manufacturing land. This a reflection of the fact that, historically, the majority of losses of land to non-B class uses have occurred on former factory sites. The impact, by use class, of adjusting the allowance is summarised below:

- B1c/B2: increase of 6.9ha (2015-2033);  
- B8: increase of 0.9ha (2015-2033); and  
- B1a/b: increase of 0.7ha (2015-2033).

\textsuperscript{80} Scenarios a,b and d include a margin of choice which is based upon two years of net take-up
Benchmarking Against Past Job Growth

Finally, it is also useful to compare the employment growth implied by the projected land requirements under each scenario with the levels of growth actually achieved in Bolsover in recent years (Figure 9.5).

Figure 9.5  Implied Annual B Class Job Growth by Scenario

From this it can be seen that both the OE baseline and the labour supply scenario assume low levels of B class employment growth over the period to 2033 (60 jobs and 30 jobs per annum). Both figures are significantly below the annual average level of employment growth observed in the District between 1991 and 2015 (275 jobs per annum). The end of the period over which past performance has been analysed was characterised by a severe recession and fragile economic recovery. As such, it is considered that planning for a portfolio of employment land that is only capable of accommodating a level of economic performance to 2033 that is significantly lower than past trends is likely to be an inappropriate strategy for the District to pursue. Furthermore, such a strategy risks artificially constraining Bolsover’s growth potential.

The highest level of implied job growth is associated with the past take-up scenario. This is driven by strong employment growth in office based sectors, as well as warehousing and logistics activities and assumes an average annual growth of 620 jobs across the B class sectors. This is more than double the yearly average of B class employment growth observed in Bolsover between 1991 and 2015 (275 jobs per annum).

It can also be seen from the graph that the projected level of employment growth assumed under the Policy-On scenario (215 B class jobs per annum) aligns relatively closely with past trends. This is particularly true when one considers the analysis presented previously which suggests that the scale of office-based growth observed Bolsover may have been overstated.
9.84 Considering employment growth in isolation, therefore, the Policy-On forecast would appear to be the most appropriate estimate of the District’s future potential, because it is closest to the annual average 1991 – 2015. Indeed, whilst it is recognised that Bolsover is planning for growth, it is difficult to anticipate future employment performance exceeding past trends.

9.85 Analysis presented in Section 3.0 shows that job growth recorded in the District was relatively modest in the period 1991 to 1999 and 2009 to 2015. The performance of Bolsover was particularly strong between 2000 and 2008, however, with this eight year period accounting for 80% of the jobs created over the twenty four years from 1991 to 2015.

9.86 The level of employment change delivered during this period was underpinned by particularly strong market conditions and the availability of significant public sector funding to unlock employment sites. It is considered unlikely that such conditions will return in the short to medium term. It is important, however, to recognise that the past trends in relation to employment consider the overall period from 1991 to 2015, thereby serving to moderate the growth observed during the pre-recession boom.

9.87 Notwithstanding the above, it does not necessarily follow that Bolsover should automatically plan for the level of employment land need implied by the Policy-On scenario. As discussed elsewhere in this report, the interactions between land and employment are complex and it is necessary to arrive at a more balanced judgement regarding land need.

Identifying a Preferred Scenario

9.88 In interpreting the outputs of this section, regard should be had to the PPG which states that local authorities should develop an estimate of future employment land requirements by taking into account a range of forecasts and data sources (both qualitative and quantitative). Planning for employment growth should avoid relying upon a single projection or forecasting technique, as there are inevitable uncertainties and limitations associated with all of the techniques advocated by PPG when applied in isolation.

9.89 There are limitations to the use of local level economic forecasts, particularly in smaller economies and also against a backdrop of significant recent changes in the economy. Furthermore, economic forecasts are regularly updated and the resulting outputs (and corresponding land requirements) will change over the plan period.

9.90 Similarly, there can be limitations to planning on the basis of past take-up. Whilst such data does reflect demonstrable demand it is based upon historic trends and one cannot automatically assume that these will be replicated moving forwards. This is particularly the case in locations where development activity may have been constrained in the past due to a limited availability of land.
Mindful of the inherent limitations of each forecasting technique, it is important to consider the merits of each through the prism of local economic and commercial market intelligence.

Within this study, four scenarios have been considered, based upon a number of methodological approaches. Some are primarily driven by economic or demographic growth projections, others by past rates of development. The employment land requirements for Bolsover identified by the four scenarios range from 23.3ha to 129.5ha for the period 2015 to 2033.

Assessing the projected annual level of B class employment change associated with each scenario shows that the OE baseline (60 jobs per annum) and labour supply (30 jobs per annum) are underpinned by job growth figures that are significantly lower than past trends (275 jobs per annum). Given that the past trends figure includes the 2008/09 recession and subsequent fragile recovery, the appropriateness of planning on the basis of either scenario is called into question due to the implicit lack of ambition.

In addition, the sensitivity testing undertaken by NLP considers a supplementary past take-up scenario which excludes three large developments for retail logistics facilities. Stripping out these schemes and the associated imported demand is considered to give a better estimate of the level of demand supported by Bolsover’s indigenous business base. This exercise gives rise to a requirement for approximately 80ha of employment land over the period 2015 to 2033. This is considerably higher than the requirements generated under the OE baseline and labour supply forecasts (25.1ha and 23.3ha respectively). On balance, therefore, it is considered that the scale of demand implied under the OE baseline and labour supply scenarios (c.25ha) should be viewed as an absolute minimum requirement for the District. It is underpinned by a baseline, policy-off assessment of needs and it is considered that pursuing a Plan based upon such a level of supply risks constraining the District’s economic potential. Furthermore, it is likely that allocating approximately 25ha of land for employment would leave little opportunity to accommodate any businesses that may be displaced from Sawpit Lane Industrial Estate as a result of HS2.

It is therefore estimated that an appropriate level of demand for the District to plan for is more likely to sit somewhere between the 47.2ha identified under the FLUTE policy-on scenario and the 129.5ha identified on the basis of past take-up. The analysis presented below gives further consideration to the preferred requirement for Bolsover, by considering each B use class in turn:
• **Offices (B1a/b):** consultation with commercial agents has revealed that the office market in Bolsover is regarded as weak. The stronger office markets surrounding the District draw many office requirements, leaving only local firms or those that are particularly cost sensitive. Whilst take-up was relatively buoyant pre-recession, this is understood to have been a reflection of a confluence of numerous factors including the availability of development finance and public sector funding, as well as pension advantages. Those agents consulted as part of this study indicated that conditions in Bolsover had since slipped back considerably and they did not anticipate that they would return to pre-recession conditions in the short to medium term.

Furthermore, it is understood that the increasing influence of technology in respect of the way we work has also weakened demand for space in Bolsover and similar locations over the past 10 years. Whereas businesses based in Sheffield or Nottingham may traditionally have also sought a smaller presence elsewhere in the wider sub-region, it is now easier for staff to work from home part of the time and then commute in to a single central office in a large urban location.

It is therefore considered that a continuation of past take-up rates is likely to constitute an over-estimate of the future requirement for office space.

Nevertheless, there is demand for space in the District from indigenous firms, as evidenced by the success of The Tangent at Shirebrook. In addition, consultation with locally active agents indicated that some provision of new office space would be well received by the market, although this was caveated by an acknowledgement that delivery by the private sector is unlikely to be viable.

Taking the above into account, it is considered that future demand for office space is likely to be more closely aligned with the policy-on scenario than past take-up rates. As such, **it is recommended that BDC plan for the provision of 10ha of land for office development (B1a/b) over the period 2015-2033.**

• **Manufacturing (B1c/B2):** the policy-on scenario assumes that manufacturing will experience a modest growth in employment (640 jobs) to 2033. This is greater than past trends, with the number of jobs in the sector having contracted by 50 between 1999 and 2015. Nevertheless, it is recognised that Bolsover’s Economic Development and Housing Strategy identifies manufacturing as one of the District’s key sector strengths, whilst growth in advanced manufacturing is being pursued as a key policy priority by the SCR LEP.
It is difficult to anticipate jobs growth being significantly higher than the level assumed within the policy-on scenario. Indeed, comparing this level of employment growth against the Labour Supply scenario would indicate that job growth is likely to run ahead of any corresponding increases in labour supply. Given the current scale of out-commuting from Bolsover, it is considered unlikely that labour supply would act as a constraint to growth. Clearly, however, this is dependent upon changes to the balance of local commuting patterns.

Notwithstanding the above, it is important to recognise that the relationship between employment change and land take in the sector is particularly complex. Indeed, whilst employment declined by 50 jobs between 1999 and 2015, demand for B1c/B2 space remained strong, with gross take-up of 26.86ha observed across the District over the period 1999/2000 to 2014/15. As such, it is suggested that it would not be unreasonable to assume that the level of employment land demand by manufacturing firms could exceed that implied by the policy-on scenario.

Within the context of the above, it is also important to note that the economic output of the industry is anticipated to exhibit strong growth, even if a more modest change in employment is to be anticipated. Whilst GVA projections are not available in relation to the policy-on scenario, the OE baseline work forecasts that the industry’s GVA could increase by almost £90m (43%) between 2015 and 2030.

Mindful of the above, and recognising that there is a degree of consensus between the B1c/B2 land requirements generated under the policy-on (16.3ha) and past take-up (25.1ha) scenarios, it is suggested that BDC should plan to meet the mid-point between the two requirements. As such, it is recommended that BDC plan for the provision of 20ha of land for manufacturing uses (B1c/B2) over the period 2015-2033.

- Warehousing & Distribution (B8): warehousing, distribution and logistics is identified as a key sector within local strategy documents. In addition, consultation with local economic stakeholder and commercial agents reiterated the importance of the sector as a driver of future growth. As such, it is critical to ensure that the District allocates sufficient land to capitalise upon this.

Consultation with local agents has indicated that Bolsover has competed well for large scale distribution developments (by virtue of its central location and strategic road access) and is expected to continue to do so in future. However, agents did highlight that competition is likely to be greater moving forwards – particularly in the short term – with sites such as Markham Vale in Chesterfield, which benefits from Enterprise Zone status.
In addition, it is recognised that past take-up of B8 space has been shaped to a large extent by three significant inward investments. Given that the retail logistics sector is relatively footloose, it is considered prudent to plan for a slightly lower level of demand moving forwards, rather than to assume that Bolsover can replicate this success and attract a further three large scale developments over the Plan period.

Discounting these large instances of take-up from past trends would still give rise to a requirement for approximately 35ha of B8 land to 2033. This is considered to represent a useful starting point for estimating the likely level of indigenous demand for space over the Plan period. As such, it is recommended that Bolsover should plan for at least 35ha of land for B8 uses.

As outlined above, however, consultation with locally active agents and economic stakeholders highlighted that an opportunity exists for Bolsover to continue to compete successfully for large logistics developments. Clearly, if Bolsover fails to factor this into the District’s future allocations, the supply of employment land to be progressed through the Plan process is unlikely to be able to accommodate such opportunities as they arise. Consequently, it is recommended that BDC incorporate an allowance for such imported demand within their allocations, cognisant of the past success of the District and the inherent appeal of the area for such uses. It should, however, be recognised that the scale of imported demand is far more difficult for BDC to control and influence, particularly against a backdrop of increased competition from surrounding authorities.

The extent to which Bolsover wishes to pursue such imported demand, and hence how closely any future requirement should align with past take-up rates, is ultimately a policy decision for the District Council. However, it is suggested that a total allocation of 70ha of land for B8 uses might represent an appropriate starting point. This is considered sufficient to meet indigenous demand, whilst also providing an appropriate level of flexibility to accommodate at least two large retail logistics developments. It is recommended that BDC plan for the provision of between 35ha and 70ha of land for warehousing and distribution uses (B8) over the period 2015-2033.

It is important to note that such a strategy may generate relatively modest employment gains for the District over and above one which simply seeks to accommodate indigenous demand. This is because large distribution uses typically require significant areas of land in order to create a small number of jobs. It is understood, for instance, that there are 400 jobs based at the Tesco distribution centre at Barlborough Links (12.4ha).

In summary, it is therefore recommended that BDC looks to allocate between 65ha and 100ha (gross) of employment land to accommodate demand from B class occupiers over the period 2015 to 2033. This should comprise of:
- 10ha of land for B1a/b (office) uses;
- 20ha of land for B1c/B2 (manufacturing) uses; and
- 35ha – 70ha of land for B8 (warehousing and distribution) uses.
10.0 Non-B Class Sectors

In addition to B Class employment, this assessment also included a high level review of non-B class employment generating uses. Sectors included as part of this review included health facilities, education provision, leisure provision and hotels.

10.1 Analysis undertaken by Bolsover District Council (BDC) demonstrates that, across the district, approximately 30ha of land previously allocated for B class employment uses – or in established industrial areas – is currently in use for non-B class employment purposes. This corresponds to approximately 12% all developed employment land and includes (inter alia):

- Uses providing supplementary services that support the broader appeal of the estates, including coffee shops, cafes, fast food restaurants, pub/restaurants, gyms, health centres and hotels (Barlborough Links for example includes a hotel, spa, NHS treatment centre and fast food outlets etc.); and

- Businesses that fall outwith the B class uses, but which have sought premises on industrial estates/business parks and have been assessed by BDC as being compatible with existing occupiers. This includes sui generis uses such as MOT centres, car showrooms, recycling facilities etc. (Brookhill for example includes an MOT centre, auto salvage centre and car dealership etc.).

10.2 Whilst not falling within B class uses, both of the above categories do generate jobs and demand for employment land. As a consequence, and to ensure that B class growth is not constrained due to sites being taken up by non-B class employment uses, this review provides an overview of the potential future demand for employment sites from non-B class sectors.

10.3 However, it should be recognised that this review is designed to provide a high level estimate only. Indeed, many of the uses considered within the following paragraphs are likely to be the subject of a detailed review of future requirements and capacity planning through their own regulatory/ statutory bodies (i.e. Health Trusts/Local Education Authorities/tourism boards). It has been informed by consultation with relevant stakeholders from each sector.

Historic Demand

10.5 Analysis of recent development activity undertaken by BDC demonstrates that over the past 16 years, 8.87ha of B class employment land has been taken up by non-B class uses, equivalent to 0.55ha per annum. Take up has typically focussed on small scale sites of less than 0.5ha, with key uses including:

- 3.68ha for Sui Generis uses that often seek premises on industrial estates (including MOT centres and waste recycling facilities);
3.52ha for a range of other Sui Generis uses (including a spa and beauty training centre and an auction house);

1.06ha of take up for retail uses;

0.35ha for food and drink uses;

0.13ha for leisure uses, including a martial arts academy; and

0.13ha for health uses.

It should be noted that uses such as MOT centres and waste recycling facilities are already included within the assessment of demand for B class sectors (see paragraph 9.11). Removing these from the above analysis would, therefore, suggest that 5.19ha of employment land has been taken by non-B class businesses over a 16 year period. This equates to 0.32ha per annum.

At a very basic level, therefore, if future take-up is assumed to follow past trends, this would imply a need for 5-6ha of employment land to meet the needs of those non-B class uses that may wish to locate on an existing industrial estate or business park over the Plan period. It should be noted, however, that this does not relate to the land requirement associated with all non-B class growth anticipated over the period to 2033. Rather, it is an estimate of the level of non-B class land take that might reasonably be expected to occupy sites allocated for B class employment uses.

The land requirements identified in Section 9.0 of this report do not include an allowance to meet the needs of non-B class occupiers.

Notwithstanding the above, it is also useful to consider the growth prospects of individual sectors. Some will clearly have a greater likelihood of locating on employment sites than others. As a consequence, understanding the overall growth trajectory of individual sectors will help to inform an assessment of the extent to which employment land will be subject to demand from non-B class uses moving forwards.

**Growth Forecasts**

Drawing on the Oxford Economics baseline forecasts used in Section 9.0, it is estimated that non-B class jobs currently account for approximately 21,070 jobs in Bolsover, some 58% of all employment. Employment in the non-B class sectors is forecast to increase by 2,500 jobs over the period 2015 to 2030, broadly maintaining the overall share of employment currently observed. Figure 10.1 considers the size of the main non-B class sectors (based upon their 2015 employment level) as well as the respective growth rates forecast to 2030.
Figure 10.1 Current Job Numbers and Projected Growth Rates of Non-B Class Sectors in Bolsover

Table 10.1 below indicates that the fastest growing non-B class sectors within Bolsover over the period from 2015 to 2030 are anticipated to be: construction$^{81}$; and human health and social work. More modest levels of growth are forecast in relation to: other service activities; arts, entertainment and recreation; and accommodation & food service activities. Conversely, job numbers in relation to utilities and education are projected to fall.

In some instances, components of these sectors are already included within the analysis of demand for B class sectors (as discussed above). As such, the analysis presented in Figure 10.1 and Table 10.1 relates only to that proportion of the sector that is not assumed to create demand for B class space.

$^{81}$ It should be noted that a small proportion of the construction industry (SIC codes 43.22 to 43.39) are included within NLP’s assessment of future B class demand. It is anticipated that the remainder of the construction industry, comprising of: construction of buildings (SIC 41); Civil Engineering (SIC 42); demolition (SIC 43.11); site preparation (SIC 43.12); testing, drilling & boring (SIC 43.13); electrical installation (SIC 43.21); roofing activities (SIC 43.91); and other specialised construction activities n.e.c (SIC 43.99) are unlikely to generate demand for B class premises. For the most part, such employment activities are likely to be itinerant in nature. As a consequence, the demand for employment space is likely to be negligible.
Table 10.1  Job Forecasts for Non-B Class Sectors in Bolsover (2015-2030)

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Construction (Non B Class)</td>
<td>2,810</td>
<td>+575</td>
</tr>
<tr>
<td>Human health and social work</td>
<td>2,695</td>
<td>+295</td>
</tr>
<tr>
<td>Other service activities</td>
<td>1,060</td>
<td>+115</td>
</tr>
<tr>
<td>Arts, entertainment &amp; recreation</td>
<td>360</td>
<td>+90</td>
</tr>
<tr>
<td>Accommodation &amp; food service activities</td>
<td>1,455</td>
<td>+70</td>
</tr>
<tr>
<td>Utilities (Non B Class)</td>
<td>490</td>
<td>-65</td>
</tr>
<tr>
<td>Education</td>
<td>3,110</td>
<td>-95</td>
</tr>
</tbody>
</table>

Source: Oxford Economics / NLP analysis

**Sector Drivers**

**Health**

10.13 Bolsover District Council’s: *Proposed Infrastructure Study and Delivery Plan for the Emerging Local Plan Strategy Document* (2012), indicates that Bolsover contains 15 General Practitioner practices, 1 hospital and 17 pharmacies. The document highlights that the hospital and pharmacy provision within Bolsover offers sufficient capacity to support future growth. With respect to GP provision the study concludes that there is sufficient floorspace to accommodate additional patients (suggesting that there is unlikely to be a pressing need for new physical development) although an undersupply of GP capacity is identified.

10.14 Consultations with NHS North Derbyshire and NHS Hardwick Clinical Commissioning Groups (which cover Bolsover), indicate that of the 7 surgeries identified as having a shortfall in physical space, since the 2012 study:

- 2 have been extended (Family Friendly Surgery and Castle Street Surgery); and
- 5 have plans in place for an extension /replacement buildings (Craggs Health Centre, Staffa Surgery, Shire’s Health Centre, Blackwell Medical Centre and Creswell Primary Care Centre).

10.15 Similarly, for the 5 surgeries identified as having a shortfall in GP capacity:

- 4 will be resolved through increased GP provision as part of the extension plans identified above (Craggs Health Centre, Staffa Surgery, Shire’s Health Centre and Creswell Primary Care Centre); and
- 1 will be resolved through funding for additional GP capacity, but will not require additional floorspace (Barlborough Medical Practice).
In terms of future capacity, the Commissioning Groups advised that plans for significant housing growth in:

- Shirebrook: will be addressed through a planned extension to the existing health centre;
- Creswell, Pinxton, Tibshelf and Whitwell: will be accommodated through existing provision and developer contributions towards increased GP capacity; and
- South Normanton: will be accommodated through the recently developed ‘The Hub’ community and health centre.

For each of the above plans, the Commissioning Groups advised that land has already been allocated for extensions/replacement buildings, with a number of the proposals including on-site extensions planning to extend on-site.

For hospital, secondary care and pharmacy provision, the position remains the same as the 2012 Infrastructure Study. At the current time, no plans are in place to extend this provision in land terms, although there is an acknowledged requirement for additional community care staffing capacity. NHS Hardwick Clinical Commissioning Group indicated that future growth was likely to be focussed on supporting independence at home, particularly for the elderly, rather than increasing hospital space, with a focus on increasing mobile community nursing staff. The Commissioning Group did, however, identify a shortfall in current care home capacity, although the precise scale of this requirement is as yet unknown.

Taking the above into account, it is considered that health provision is unlikely to generate demand for employment land in the short to medium term, with the potential exception of care home provision. Further detailed analysis of care home requirements will be carried out by the Commissioning Group as part of future capacity studies and will need to be assessed alongside emerging private sector provision. It will be important that BDC engages in this exercise in order to understand whether the outputs of the work require a response in land terms. Whilst a proportion of any future care home provision may consider land within employment sites, it is considered unlikely that this will form the first choice of location, with care homes sites typically located alongside residential schemes.

**Education**

The 2012 *Proposed Infrastructure Study and Delivery Plan* (2012), indicates that Bolsover contains 33 primary schools and 5 secondary schools.

At the primary level, the study identifies a surplus of 644 primary pupil places, but capacity shortfalls in South Normanton, Barlborough and Clowne. At the secondary level, the study identifies a surplus of 297 places, but a capacity shortfall in Tibshelf.

Consultations with the Derbyshire County Council Education Officers reveal that since the publication of the 2012 study, plans are underway to provide an
additional classroom at Clowne Infant school and a double classroom at Clowne Junior school in order to increase local capacity. Proposed housing provision at South Normanton and Barlborough will also include provision for additional primary education contributions which will support increased capacity.

For secondary provision, it is considered that the opening of a new high school at Tibshelf has addressed any previously identified capacity issues. Future housing growth at Bolsover, South Normanton and Barlborough will be addressed through the on-site expansion of existing provision, supported by developer contributions and growth in Shirebrook and smaller villages can be accommodated through existing provision.

The developments outlined above are anticipated to take place on the existing school grounds, and therefore present no impact on wider employment land requirements. School capacity assessments undertaken by the Local Education Authority currently indicate that there will be sufficient capacity provided by these planned developments to accommodate growth, although these are reviewed on a 5 year basis, taking into account emerging demographic trends.

For nursery provision, consultees indicated that there is an existing undersupply, although the development of new sites is driven by market demand, rather than local authority provision. As a result, stakeholders were unable to quantify the potential demand for new facilities. Historic data from BDC shows no instances of nurseries being developed on employment sites. However, experience from elsewhere suggests that the sector does consider such locations and so the potential for B class land take up cannot be entirely discounted.

**Leisure Provision**

The 2012 Infrastructure Study indicates that Bolsover benefits from:

- 3 leisure centres: including Creswell, Kissingate and Clowne leisure centres;
- 3 sports halls: including Federick Gent Community Sports Centre, Tibshelf Community School Sports Hall and Creswell Church Rooms; and
- 32 publically run community and village halls: including 4 in Bolsover, 3 in Clowne, 3 in Shirebrook, 2 in South Normanton and 19 in the main villages.

The 2012 sub-national population projections indicate that the population of Bolsover is forecast to increase by +6,400 residents from 76,400 in 2012 to 82,800 in 2033. The Sport England Facilities Calculator estimates that a population increase of this scale will give rise to an increased demand for 67 sqm of swimming pool space (or 1.26 lanes), 0.44 sports halls, 0.46 indoor
bowls rinks and 0.19 artificial turf pitches. It is considered that increased need of his magnitude is unlikely to elicit a significant supply-side response. In addition, it is understood that BDC has recently granted planning permission for a new swimming pool at the Arc, Clowne (15/00154/FUL).

Consultations with Council officers also indicate that there is sufficient capacity within existing provision to accommodate this growth in land terms. Where significant new housing developments are proposed, further discussions will be held to ensure that local capacity can meet emerging needs, and developer contributions are secured to support this process where required. At this stage, it is not possible to estimate the potential contributions to be sought, however, the above analysis suggests that it is unlikely that new facilities will be required. More generally, an increase in population could drive additional demand for gyms and sports clubs etc. which do sometimes seek land on business parks (for example, Bolsover Business Park North contains a Martial Arts Academy).

Overall, however, consultees considered that taking into account existing provision, it is unlikely that this will give rise to a significant demand for employment land.

## Hotels

Hotel provision is provided by the private sector on a market demand basis, rather than in response to an identified need. As such, there is limited evidence surrounding specific local requirements.

Nevertheless, consultations with BDC Tourism officers indicate that demand for a number of key attractions in Bolsover has increased following significant investment in Hardwick Hall, Bolsover Castle and Creswell Crags. Indeed, Visit England data demonstrates a rise in domestic overnight trips from 30,000 per annum between 2007-2009 to 48,000 per annum between 2012 and 2014. Alongside this, average length of overnight stays has risen from an average of 2.0 nights in 2007-2009 to 3.1 nights in 2012-2014. 

Despite this level of growth, over 95% of all visitor trips to Bolsover during 2012-2014 were by day visitors. BDC Tourism officers have suggested that this could demonstrate that potential for further growth in the overnight market may exist, subject to the provision of the appropriate accommodation product. Recent developments in neighbouring North East Derbyshire including the Twin Oaks at Junction 29 of the M1 and the Peak Edge Hotel are also considered by BDC tourism officers to demonstrate local demand for additional bed spaces.

In order to capitalise on this growth, tourism representatives identify the need for additional hotels and a broader accommodation offer within the Bolsover District. Current estimations include the potential for up to 3 new mid-range

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82 Sport England, (2012), Sports Facilities Calculator  
83 Visit England, (2014), Domestic Overnight Tourism  
hotels to supplement the current market offer - although it is recognised that
this will be driven by market demand.

Whilst demand is primarily driven by leisure trips, some operators will consider
business park locations (for example, Ibis at Barlborough Links). However,
given the scale of the projected demand – and the size of Bolsover’s economic
base, making it likely that new hotels will be pitched predominantly at the
leisure, rather than business tourism market – it is anticipated that it is unlikely
to manifest itself in a significant demand for employment land. Where
occupiers do consider locations on industrial estates or business parks, it is
suggested that those with strong accessibility to the M1 corridor are likely to
hold the greatest appeal.

Conclusions

As outlined above, non-B Class sectors including health, education and leisure
facilities are currently expected to take up a low level of new employment land,
with additional capacity typically provided through increased staff capacity, or
on-site extensions. Capacity assessments for health and education are
reviewed on a regular basis, identifying changing demographic trends and
potential capacity shortfalls. Based on current projections, consultees consider
that future capacity will be met through either existing provision, or developer
contributions towards additional provision considered as part of a specific
application.

There is, however, currently a recognised shortfall in care home and nursery
provision that is likely to drive demand for additional land. Whilst the scale of
this requirement is currently unknown and largely driven by market demand, it
is considered unlikely to place significant pressure on employment land
requirements.

Similarly for hotel provision, whilst tourism officers recognise the potential for
additional hotels in the local area to increase the proportion of overnight visits,
the scale of this demand is likely to be low in terms of additional land
requirements, and driven by market demand.

None of the sectors considered in the preceding paragraphs appear likely to
generate a strong demand for employment land in Bolsover over the Plan
period. Based upon past trends – and patterns of development observed
elsewhere – it is suggested that sui generis occupiers will account for the
majority of employment land lost to non-B class uses.
11.0 **Demand/Supply Balance**

11.1 This section draws together the forecast requirement for B class land with an assessment of the available supply, in order to determine whether BDC has sufficient employment to meet demand over the Plan period.

### Demand for Employment Land

11.2 Section 9.0 recommends that BDC gives consideration to allocating between 65ha and 100ha of employment land for B class uses over the period to 2033. An allocation towards the lower end of the range is considered sufficient to meet indigenous demand, whereas an allocation towards the higher end is likely to be required in order to position Bolsover to compete successfully for imported demand from the logistics and distribution sector.

11.3 It should be noted that this range of requirements does not include any specific allowance to take account of:

1. The possible need to identify a compensatory allocation to meet the needs of those businesses that could be displaced from Sawpit Lane Industrial Estate as a consequence of HS2 (Phase 2) which could occur during the Plan period; and

2. The prospect of non-B class occupiers seeking premises on sites allocated for B class employment uses. It is understood that BDC is giving consideration to the possible need to factor in a ‘buffer’ to accommodate such need (where appropriate) without it encroaching upon the availability of land for B class businesses.

11.4 Notwithstanding the above, it should be noted that issue 1 has influenced this study’s conclusions regarding the overall level of need to be planned for across the District. It is considered that the preferred range identified is likely to provide sufficient scope to accommodate demand from any displaced occupiers.

### Employment Land Supply

11.5 As outlined in Section 6.0, 26 sites comprising of 203.71ha of land were put forward for assessment by BDC. This included a combination of: allocated employment sites; unallocated employment sites with extant planning permission for employment development; and potential employment sites.

11.6 In addition, a number of sites that could comprise part of the District’s pipeline supply were not submitted for assessment as part of this exercise. It is understood that those sites excluded from the assessment are those where BDC has a greater degree of confidence regarding their deliverability and
suitability for employment purposes. In total, these sites account for a further 34.22ha of employment land\(^\text{85}\).

11.7 Drawing the above together, it can be seen that Bolsover has a potential supply of employment land totalling some 237.93ha. Clearly, when set against a requirement of between 65ha and 100ha over the Plan period, this represents a significant oversupply in purely quantitative terms and there is a need to give consideration to rationalising Bolsover’s portfolio.

11.8 Given the scale and complexity of the District’s supply of employment land, it is considered helpful to disaggregate the overall stock into its component parts (i.e. consented sites, allocated sites and sites with no planning designation). The contribution that the sites within each category can make to accommodating anticipated demand across the District is considered in turn in the following paragraphs.

**Sites with Extant Permission for Employment Development**

11.9 Based upon information provided by BDC it is understood that there are nine employment sites across the District that currently benefit from extant planning permission for B class employment development. The nine sites are listed in Table 11.1 and account for 75.47ha of land in total.

11.10 Six of the nine sites (totalling 32.10ha) have not been assessed as part of this study. It is understood that they have been excluded from the exercise on the basis that BDC officers are confident that they represent good locations for B class development and can be delivered over the Plan period (or sooner).

11.11 The three sites listed below (totalling 43.37ha) were assessed as part of this study.

- Land between Brickyard Farm and Barlborough Links (16): 4.44ha. The site was awarded a score of 22 through the site assessment process and classified as a ‘good’ employment site. This reflects the site’s proximity and access to the strategic road network (via Junction 30 of the M1) and its market attractiveness (it offers the potential to serve as an extension to the popular Barlborough Links Business Park). Given the scope for further infill development on Barlborough Links (including 1-BA1 and 1-BA2 listed in the table above) and the potential need to remediate the site, it is considered unlikely to be delivered in the short term (i.e. within 5 years);

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\(^{85}\) This comprises of 32.1ha of land with planning permission and 2.12ha of allocated employment land
- Land at Seymour, Markham Vale (21): 12.20ha. The site was awarded a score of 21 through the site assessment process and classified as a 'good' employment site. This parcel of land is part of the wider Markham Vale Enterprise Zone – one of Derbyshire’s key employment locations – which benefits from excellent access to the M1. A link road is currently being provided, in order to provide access into the site and it is understood that the site is expected to be capable of accommodating occupiers from late 2016/early 2017; and

- Coalite, Bolsover (17): 31ha (of which 26.73ha is anticipated to be available for B class development). The site was awarded a score of 18 through the site assessment process and classified as an ‘average’ employment site. Historically associated with coal oil chemical processing, the site requires significant remediation in order to bring it back into use. Given the site’s proximity to the strategic road network and the opportunity to provide large development plots, it is considered that it would be well received by the market once it is remediated and available. It is understood that, following the granting of planning consent, on-site works are anticipated to commence in 2016. Given that the full clean-up of the site has been estimated to require 3 years and the availability of land on the nearby Markham Vale, it is considered unlikely that the site will play a significant role as an employment location in the short term (i.e. within 5 years). It is, however, understood that the site is currently being promoted as a potential Enterprise Zone location by the D2N2 and Sheffield City Region LEPs. In the event that the site is awarded Enterprise Zone status, the financial incentives on offer could help to support the earlier delivery of the site.
Table 11.1  Sites with Planning Permission for B Class Development

<table>
<thead>
<tr>
<th>Site Name</th>
<th>L/A Ref</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports Direct Complex, Brook Park</td>
<td>1-SH1</td>
<td>7.60</td>
</tr>
<tr>
<td>Land off Blacksmith Way</td>
<td>1-SH3</td>
<td>2.15</td>
</tr>
<tr>
<td>2 Vernon St</td>
<td>1-SH14</td>
<td>0.12</td>
</tr>
<tr>
<td>Castlewood Business Park (north)</td>
<td>1-SN9</td>
<td>10.68</td>
</tr>
<tr>
<td>Land off Midland Way</td>
<td>1-BA2</td>
<td>1.50</td>
</tr>
<tr>
<td>Land between Brickyard Farm and Barlborough Links (16)</td>
<td>1-BA5</td>
<td>4.44</td>
</tr>
<tr>
<td>Land at Seymour, Markham Vale (21)</td>
<td>1-C1</td>
<td>12.20</td>
</tr>
<tr>
<td>Former Armstrong Colliery, Steetly</td>
<td>1-C2</td>
<td>10.05</td>
</tr>
<tr>
<td>Coalite, Bolsover (17)</td>
<td>2-B5</td>
<td>26.73</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>75.47</strong></td>
</tr>
</tbody>
</table>

Source: Bolsover District Council

11.12 Taking into account the above, and mindful of the existing planning permissions in place, it is considered that all 9 sites should be included as part of the portfolio of employment land to be allocated in order to meet projected demand over the Plan period. This would provide a supply of 75.47ha, which could be sufficient to meet projected quantitative needs at the lower end of the identified range.

**Coalite, Bolsover**

11.13 It is recognised that the Coalite site (17) has remained undeveloped since 2004. Ordinarily, this would call into question its future prospects of delivery. NPPF (Paragraph 22) is clear that local planning authorities should avoid simply rolling forward historic allocations with little chance of delivery when developing or updating Local Plans:

“Planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose.”

11.14 As such, and mindful of the length of time that this particular site has remained vacant, it is necessary to consider whether it should be allocated as part of Bolsover’s future portfolio of employment land.

11.15 Based upon the site assessment and discussions with locally active commercial agents, Coalite’s potential as an employment location is considered to be strong. The site benefits from very good access to the

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86 Whilst the Coalite site extends to 34.1ha, it is understood that 26.73 of this will be available for B class development
strategic road network and offers the potential to provide large plot sizes to industrial occupiers. These two factors have been fundamental to the success of Bolsover’s key employment destinations in recent years. In addition, the profile and market appeal of Coalite’s location is considered to be good, benefitting from its proximity to Markham Vale.

In spite of the inherent appeal of Coalite’s scale and location, development has historically been constrained by the level of remediation required and the implications of this with regard to development viability. In this respect, it is important to note that proposals for a residential-led, mixed-use development scheme are currently being progressed through the planning system.

The proposals would see residential development take place on that part of the site located within North East Derbyshire, with 26.73 ha of land in Bolsover developed for B class uses. Whilst it is understood that residential development can only commence following the completion of site remediation works across the whole site, it is anticipated that the returns generated by the residential development will ultimately help to cross-subsidise the remediation of the site, thereby addressing the key constraint that has historically held the site back. NLP has been advised that a viability appraisal has been submitted to North East Derbyshire Council providing detail on the financial viability of the proposals. However, this has not been made available to NLP due to the commercially sensitive nature of the document’s contents.

The granting of planning permission for the redevelopment of that part of the site in Bolsover means that the land is now part of the District’s pipeline supply and – in the absence of any compelling evidence to the contrary – should be considered as part of the available stock of land. Furthermore, the potential to cross-subsidise the remediation of the site gives much greater confidence regarding the site’s prospects of delivery over the Plan period.

It is important, however, to acknowledge that North East Derbyshire Council has not yet determined the application for residential-led development on the other part of the Coalite site. Whilst NLP has received no indication from North East Derbyshire Council as to the likely outcome of the planning process, it is considered that a refusal would present a risk to the delivery of the employment land at Coalite located within Bolsover.

It is noted that the site has been vacant for some time and was not delivered prior to the economic downturn, when public sector funding for site preparation work was more plentiful and readily available. Clearly, the prospects of securing the necessary funding would be even more challenging now, given the current funding landscape. It is, however, understood that public sector funding opportunities (in liaison with the LEP) are being pursued in order to remediate Coalite and bring it forward as an extension to Markham Vale.

Assessed Sites: Allocations

Fourteen allocated employment sites were put forward by BDC for review as part of this study. In total, the sites account for 27.10ha of land. Having regard
to the site assessment work and desk-based analysis, it is considered that **0.80ha of Land at Pit Lane, Pleasley (7) 0.80ha** should be discounted from the supply. It is understood that the site benefits from an extant planning permission for the delivery of up to 23 houses which is not due to lapse until September 2016. As such, there remains a prospect of the land coming forward for residential development and it cannot be considered as a deliverable employment site at present.

In addition, it is recommended that the Council gives consideration to de-allocating and removing from the employment land supply those sites listed below. This recommendation is made having regard to the site assessment process (which adjudged the sites to be of poor quality) as well as the quantum of employment land already consented across the District:

- **Park View (North), Whaley Thorns (12): 1.09ha.** Topography and access issues would reduce the net developable area of the site, whilst it is also noted that it features a number of pathways linking to nearby residential uses. The site was classified as ‘poor’ through the assessment process. In addition, it is considered that the continued allocation of 0.58ha of land at the adjacent Park View (South) (11) — to serve as an extension to the existing employment provision on Park View — is likely to be sufficient to meet any local demand in the Whaley Thorns area;

- **Whitwell Colliery (West of Southfield Lane), Whitwell (13): 3.89ha.** The site was considered to be of ‘poor’ quality, owing to its irregular, ground conditions and poor strategic and local access. It was also noted that a number of units on the nearby Southfield Industrial Estate were vacant, despite appearing to be of reasonable quality. This was taken as an indicator that local need for employment accommodation is already satisfied;

- **Whitwell Colliery (East of Southfield Lane), Whitwell (14): 4.28ha.** See Whitwell Colliery (West of Southfield Lane) above. It should be noted that this site was assessed as being of even poorer quality, given the greater challenges in respect of ground conditions and local access arrangements.

Removing the 4 sites discussed above from the allocated sites assessed as part of this exercise would leave 10 sites that are considered suitable to be retained as employment allocations. In total the ten sites (which are listed below) comprise of 17.04ha of employment land.

Adding the ten sites to the 75.47ha of land already consented for employment development across the District would result in a portfolio of 92.51.
Table 11.2 Assessed Sites (Allocations) with Good Employment Potential

<table>
<thead>
<tr>
<th>Site Name</th>
<th>NLP Ref</th>
<th>L/A Ref</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land North of Bolsover Business Park</td>
<td>1</td>
<td>2-B2</td>
<td>1.65</td>
</tr>
<tr>
<td>Mansfield Road, Hillstown, Bolsover</td>
<td>2</td>
<td>2-B3</td>
<td>1.12</td>
</tr>
<tr>
<td>Riverside Way, Bolsover</td>
<td>3</td>
<td>2-B1</td>
<td>1.30</td>
</tr>
<tr>
<td>Colliery Road, Creswell</td>
<td>4</td>
<td>2-CR1</td>
<td>1.51</td>
</tr>
<tr>
<td>Creswell Colliery South, Creswell</td>
<td>5</td>
<td>2-CR2</td>
<td>1.57</td>
</tr>
<tr>
<td>Beaufit Lane, Pinxton</td>
<td>6</td>
<td>2-P1</td>
<td>2.95</td>
</tr>
<tr>
<td>Portland Road/Vernon Street, Shirebrook</td>
<td>8</td>
<td>2-SH6</td>
<td>4.49</td>
</tr>
<tr>
<td>Land South of Maisie’s Way, South Normanton</td>
<td>9</td>
<td>2-SN1</td>
<td>1.05</td>
</tr>
<tr>
<td>Land at Carter Lane, South Normanton</td>
<td>10</td>
<td>2-SN2</td>
<td>0.82</td>
</tr>
<tr>
<td>Park View (south), Whaley Thorns</td>
<td>11</td>
<td>2-WT1</td>
<td>0.58</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>17.04</strong></td>
</tr>
</tbody>
</table>

Assessed Sites: Unallocated Land

A further 9 unallocated sites (totalling 133.24ha) were put forward for assessment by BDC. Drawing upon commercial market intelligence and the assessment process, three of these sites were identified as good potential employment allocations. These sites are discussed in turn below:

- **Land East of Rotherham Road, New Houghton (22):** 0.90ha. In total, the site comprises of 6.00ha of land. The site has been put to Bolsover Council as a potential mixed-use development comprising of 0.90ha of employment land. Based upon the site assessment work, the site is considered to be suitable for employment development (office or light industrial) to accommodate indigenous demand. It is suggested that BDC give consideration to allocating 0.90ha of employment land (possibly rising to as much as 2ha) in order to meet the requirements of indigenous businesses over the Plan period;

- **Bolsover Business Park, Bolsover (15):** 5.50ha. The site includes existing employment premises of varying quality that are nevertheless well occupied. Overall, the site was assessed as being of good quality via the site appraisal process. It is recommended that the business park and Northgate are considered for allocation for employment use, providing approximately 3.67ha of available land. It is recommended that the field adjacent to the Castle Arms public house, however, remains in agricultural use.
• Wincobank Farm, South Normanton (25): 13.03 ha. The site benefits from excellent access to the strategic road network and is located in South Normanton – a popular industrial location within the District. Whilst the South Normanton and Pinxton area accounts for half of all employment floorspace in the District, the 92.51 ha of potential allocations outlined in the preceding paragraphs includes only one site of any scale in the area (10.68 ha of consented land at Castlewood Business Park (North)). Historically, the area has proven attractive to larger occupiers, with the Co-op taking a 17.73 ha site on Castlewood Business Park in 2012/13. Mindful of this, it is suggested that BDC may wish to give consideration to allocating land at Wincobank Farm, either in full or in part (with the remainder potentially being safeguarded for employment uses beyond the Plan period).

11.26 In the event that BDC were to allocate 0.90 ha on Land East of Rotherham Road, 3.67 ha at Bolsover Business Park and 13.03 ha of land at Wincobank Farm, this would give rise to a total portfolio of 110.11 ha. This is considered to be broadly in alignment with the top end of the preferred range of requirements outlined in Section 9.0.

11.27 The exclusion of Wincobank Farm would reduce the portfolio to 97.08 ha. Should BDC take the decision to plan on the basis of 100 ha of demand (which is predicated on Bolsover continuing to compete successfully for imported demand) it is considered that the District would benefit from a larger supply of sites (as well as a greater range and choice) in the South Normanton/Pinxton area – a location that has proved successful historically in attracting both indigenous occupiers and footloose investment from the retail logistics sector.

Distribution of Sites

11.28 As discussed elsewhere in this report, it is anticipated that Bolsover is likely to require in the order of 65 ha of land in order to cater for indigenous demand over the period to 2033. At present, sites with planning permission already in place for employment development account for some 75.47 ha of employment land. At a quantitative level, therefore, it could be argued that no further allocations are required over and above this in order to meet indigenous need.

11.29 It must be recognised, however, that the preceding sections of the report have indicated that projected need could be anticipated to rise to 100 ha in the event that BDC continues to successfully compete for imported demand from the logistics and distribution sector. Under such circumstances, a committed supply of 75.47 ha of employment land would be insufficient to meet forecast need and further allocations would be required.

11.30 It is considered that a decision regarding the appropriate point to plan for within the range of preferred requirements (65 ha to 100 ha) is a policy matter to be determined by BDC. This decision will then have implications regarding the supply of land to be allocated through the emerging Local Plan.
11.31 Mindful of the above, this section of the report has considered the District’s supply of land under three distinct categories. Within each category, the report makes recommendations regarding those sites that could merit inclusion within the Council’s future portfolio of employment sites. The extent to which the allocation of these sites is likely to be required, however, will only become clear once BDC has taken a view regarding the level of demand that the District wishes to plan for over the period to 2033. The site categories are summarised below:

1. Sites with extant planning permission for employment development;
2. Allocated employment sites that have been assessed as part of the EDNA process; and
3. Unallocated employment sites that have been assessed as part of the EDNA process.

11.32 Table 11.3 provides a summary of the distribution of employment land by settlement under three alternative scenarios:

1. BDC allocates only those sites that benefit from extant planning permission for employment development;
2. BDC allocates: those sites with extant planning permission; and those allocated sites that were considered – through the site assessment process – as being suitable for employment uses; and
3. BDC allocates: those sites with extant planning permission; those allocated sites that were assessed as being suitable for employment use; and up to 17.60ha\(^87\) of land on unallocated sites that were considered as potentially being suitable for employment uses.

11.33 In addition, the table provides an overview of market views regarding the relative strength of demand in each sub-area. This analysis is presented within the context of the local (as opposed to regional or national) market for commercial land and premises.

11.34 From this it can be seen that planning on the basis of consents alone would leave the District with no available employment land in: Creswell & Whitwell; or Newton & Tibshelf. In addition, it would yield a supply of under 11ha within the Pinxton and South Normanton area – a popular employment location, with good access to the strategic road network and an area that currently accounts for 50% of all employment floorspace within the District.

\(^{87}\) Comprising of 0.90ha of land east of Rotherham Road, 3.67ha of land at Bolsover Business Park and up to 13.03ha of land at Wincobank Farm
### Table 11.3  Distribution of Planning Permissions and Sites with Good Employment Potential

<table>
<thead>
<tr>
<th>Anticipated Level of Demand</th>
<th>Portfolio of Sites (ha)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Consents (1)</td>
<td>Consents plus allocations (1+2)</td>
</tr>
<tr>
<td>Bolsover</td>
<td>26.73</td>
<td>30.80</td>
</tr>
<tr>
<td>Clowne &amp; Barlborough</td>
<td>5.94</td>
<td>5.94</td>
</tr>
<tr>
<td>Creswell &amp; Whitwell</td>
<td>-</td>
<td>3.08</td>
</tr>
<tr>
<td>Newton &amp; Tibshelf</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Pinxton &amp; South Normanton</td>
<td>10.68</td>
<td>15.50</td>
</tr>
<tr>
<td>Shirebrook</td>
<td>9.87</td>
<td>14.36</td>
</tr>
<tr>
<td>Rest of District</td>
<td>22.25</td>
<td>22.83</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>75.47</td>
<td>92.51</td>
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</tbody>
</table>

It should be noted that Table 11.3 does not include any allowance for four small allocations that were not put forward by BDC for assessment. Should BDC take a decision to include these in the future portfolio of employment land, this would add a further 2.12ha of land.

### The Provision of Large Sites

In the event that BDC takes the decision to plan for a requirement of c.100ha of employment land over the Plan period – in order to compete for imported demand from the logistics and distribution sector – the availability of large sites with good strategic road access will be critically important. It is understood that much of the District’s recent success in terms of employment land delivery has been driven by three large employment allocations – with stronger take up rates observed on these sites than elsewhere in Bolsover:

- Pinxton Castle / Wincobank Farm;

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88 Whilst demand is anticipated to be low across much of this area, it should be noted that it includes land at Markham Vale, where demand is anticipated to be strong

89 Land off Weighbridge Road (south), Shirebrook (1.07ha); Land off High View Road (south), South Normanton (0.36ha); Small Corner Plot on High View Road, South Normanton (0.27ha); and Land at High Hazels Road, Barlborough (0.42ha)
11.38 Taken together, the three sites listed above have accounted for 59% of all employment land developed in Bolsover since 2000. Consultation with BDC officers and other stakeholders has indicated that the success of the three sites is considered to demonstrate the benefit of allocating large sites that are capable of: accommodating large developments; and of being delivered in a planned and co-ordinated fashion. The co-ordinated delivery of sites has included the provision of new access roads and site infrastructure and the creation of development plateaux, in order to ‘pump-prime’ parcels of land.

11.39 Clearly, the availability of sites capable of accommodating large developments becomes less important if BDC ultimately decides to plan for a requirement of 65ha which is considered to align with indigenous demand over the period to 2033. Nevertheless, the availability of flexible, well-planned employment allocations would still offer considerable benefits to the local area.

11.40 It is understood from BDC that the allocations at Pinxton Castle/Wincobank Farm, Barlborough Links and Brook Park are expected to be built out (on the basis of current take-up rates) at varying points during the Plan period. Mindful of this, NLP were asked to advise as to whether there was a need for BDC to identify and allocate a new employment location of 30ha to 40ha in size.

11.41 In considering the above, it is important to note that there are already three large sites with planning permission for employment development providing 49.61ha of land in total:

- 26.73ha of land at Coalite;
- 12.2ha of land at Seymour, Markham Vale; and
- 10.68ha of land at Castlewood Business Park (north).

11.42 In addition, BDC identified a 13.03ha site at Wincobank Farm for assessment as part of the EDNA. Whilst this site is unallocated at present and does not benefit from planning permission, it was considered to offer good potential as an employment site. Should BDC decide to allocate this parcel of land, the District would then benefit from 62.64ha of land across four large sites – all with good access to the strategic road network. Based upon discussions with commercial agents active in the local area, it is understood that sites at Markham Vale, Wincobank Farm and Castlewood Business Park (and to a lesser extent Coalite) are, from a purely locational perspective, likely to be viewed favourably by retail logistics operators.

11.43 Notwithstanding the above, BDC Officers have highlighted that:

- Land at Seymour, Markham Vale and land at Castlewood Business Park (North) have each been subdivided to provide two smaller plots in each location; and
- The outline planning permission recently secured in respect of Coalite does not include any large scale retail logistics development.
The subdivision of land at Seymour, Markham Vale and Castlewood would appear to limit the scope of these locations to accommodate the very largest enquiries. However, it is estimated that the northern parcel of land at the former measures 8.8ha. By means of comparison, the Sports Direct scheme brought forward at Brook Park in 2004/05 was developed on a 9.8ha plot. Clearly, therefore the site would still offer the opportunity to accommodate development of a significant scale. The site at Castlewood has not been assessed as part of the EDNA, however, it is understood from BDC officers that the larger of the two parcels measures approximately 7.13ha.

Having regard to the above, it is considered that Coalite and, in particular, Wincobank Farm offer the greatest potential to meet future demand from large logistics/distribution occupiers. This is by virtue of the opportunity afforded by both sites to provide large development plots. Whilst it is recognised that the outline planning permission relating to Coalite does not include any large scale logistics development, the site is yet to be remediated and sub-divided into development plots. As such, it currently retains an inherent flexibility to respond to demand for large scale development.

Given the scale of supply within the District’s pipeline and having regard to anticipated future need, it is considered unlikely that a further large, single allocation would be required in Bolsover during the period to 2033. Certainly, no allocations of this nature should be progressed ahead of further exploration between BDC officers and the landowners and developers of the four sites listed above. Such discussions should be held in order to determine the extent to which these sites can be taken forward in a manner that enables them to retain the ability to respond to large scale development opportunities.

In the event that such discussions do not give BDC officers the necessary confidence that Bolsover is able to identify a small number of larger development plots in locations in the west of the District, it may be necessary to give further consideration to the need to allocate a single, large site capable of addressing this potential gap in the market. Such a response will only be required in the event that BDC decides to plan for a level of growth that is dependent on the District continuing to compete successfully for imported demand from the logistics sector. It should be noted that such a strategy is likely to necessitate a rationalisation of the employment land portfolio – through the exclusion of some of the sites identified as suitable employment locations within this document – in order to ensure that the allocation of an additional large site does not give rise to a significant oversupply of employment land in the District.

It is noted that land is still available on locations such as Brook Park and Barlborough Links and it is considered likely that these established locations will continue to fill up (as well as sites such as Markham Vale in Chesterfield) before new sites such as those listed above begin to gather any real momentum.

As the supply of land on sites such as Brook Park and Barlborough Links begins to tighten further, it is recommended that BDC explores opportunities to
create the necessary conditions to support strong employment take-up on locations including Coalite, Castlewood Business Park (north) and land at Seymour (or elsewhere on a new allocation). This will include many of the interventions that helped to underpin the success of earlier sites, including: site preparation works to create serviced development plots; and developing clear development briefs or establishing Local Development Orders.
12.0 Conclusions

12.1 This section draws together the overall conclusions emerging from the preceding sections of the report.

Overview of Bolsover’s Economy

12.2 Desk-based analysis suggests that Bolsover recorded strong employment growth over the period last from 1991 to 2015, with 14,600 new jobs (and 6,610 B class jobs) delivered. Much of the growth in B class jobs appears to have occurred between 2000 and 2008, with far more modest rates of change observed before and after.

12.3 A detailed interrogation of the data, however, raises some concerns that the figures may overstate the scale of office-based growth (the key driver of B class jobs growth with an increase of 4,220) observed in the District. Strong employment growth was also observed in relation to the warehousing and distribution sector over the period 1991 to 2015, with a far more modest increase observed in manufacturing.

12.4 The business base in Bolsover accommodates a slightly lower share of smaller firms and a higher share of larger firms compared with regional and national averages. It is also characterised by relatively low levels of business start-up. The largest concentrations of businesses are located around Bolsover town centre, the M1 corridor, Shirebrook and – to a lesser extent – Creswell and Whitwell. The smaller settlements including Newton, Tibshelf, Clowne and Barlborough also play an important role in accommodating firms and jobs.

12.5 Bolsover is characterised by an uneven set of labour market indicators including high levels of jobs growth, but relatively low economic activity rates and generally high levels of deprivation. Workplace and resident wages lag behind the corresponding figures for Derbyshire, East Midlands and the UK – potentially reflecting the low proportion of knowledge-based businesses in the District.

Functional Economic Market Area

12.6 Bolsover’s Functional Economic Market Area (FEMA) is characterised by a range of economic, property and labour market factors and driven by its geographic location. Located within North East Derbyshire, the District falls within two LEP areas (SCR and D2N2) – reflecting the fact that the area is influenced by its relationships with: South Yorkshire to the north; Derbyshire to the south west; and Nottinghamshire to the south east.

12.7 Strong commuting flows out of (and to a lesser extent into) the District provide a key reference point for understanding its FEMA. Almost 70% of Bolsover’s working residents travel outside of the District for employment, giving rise to a self-containment rate of approximately 30% and indicating that Bolsover’s
FEMA extends beyond its own borders. The neighbouring authorities of Chesterfield, Ashfield, Amber Valley, Mansfield and North East Derbyshire represent the origin and destination of the majority of commuting flows into/out of the District.

Based upon the ONS methodology for defining labour market areas, Bolsover’s FEMA comprises the six local authority areas of: Chesterfield; North East Derbyshire; Amber Valley; Bassetlaw, Mansfield and Ashfield. Taken together, the six authorities (plus Bolsover) comprise the workplace for 80% of Bolsover’s resident working population and the residence for 76% of Bolsover’s workers.

With the exception of a small number of large retail warehousing developments, which tend to be relatively footloose in nature, the District’s commercial property market is largely characterised by localised demand. Bolsover is located between a number of larger, more established commercial centres such as Sheffield, Nottingham, Derby, Worksop, Chesterfield, Mansfield and Retford and has historically tended not to compete significantly with these centres for office or manufacturing firms.

This suggests that, from a commercial property market perspective, Bolsover’s FEMA does not currently extend far beyond the District boundary. Clearly, however, there are some localised relationships, as demonstrated by cross-border developments such as Markham Vale and Castlewood Business Park.

### Market Signals

The provision of employment space in Bolsover – whilst modest in comparison with many of the adjoining authorities – is dominated by industrial (factory and warehousing) uses. Significant concentrations of industrial floorspace can be observed in the Pinxton and South Normanton area, as well as (to a lesser extent) Shirebrook.

The growth in the provision of employment floorspace observed in Bolsover over the period 2000-2012 was particularly strong – outstripping the rates of increase experienced by all of the neighbouring authorities. Growth was driven primarily by the delivery of industrial space.

Agents have indicated that a viability gap (between achievable rents/capital values and delivery costs) is constraining the supply of new industrial space. This is not envisaged – by agents – to change significantly in the short term. Should market conditions improve such that there is a return to easier viability in Bolsover, the District’s central location is expected to appeal to national footloose requirements for warehousing and logistics space.

Office premises in Bolsover account for c.8% of total B class space. This proportion of floorspace is not untypical of many of the surrounding areas, although the overall scale of provision (63,000sq.m) is low. The stock of office space in the District is largely concentrated in Clowne and Barlborough, as well as Pinxton and South Normanton.
Consultation with locally active agents indicated that the office market is considered to be in equilibrium at a low level. Occupier demand is weak and generally limited to indigenous firms with a strong link to Bolsover. The delivery of new office stock – on a relatively small scale – has been well received by the market. However, agents anticipate that any further provision will need to be led and subsidised by the public sector for the foreseeable future.

**Meeting Future Needs**

In assessing the future need for employment land in Bolsover, this study has taken account of four scenarios based upon a number of methodological approaches. Some are primarily driven by economic or demographic growth projections, others by past rates of development. The employment land requirements for the District over the period 2015 to 2033 range from 23.3ha to 129.5ha.

In addition to the four scenarios, a range of sensitivity tests have also been considered. One sensitivity test considers a supplementary past take-up scenario that excludes three large retail logistics developments that have taken place in recent years. This has been presented as an alternative means of assessing the level of land take that has historically been supported by the District’s indigenous business base. The analysis gives rise to a requirement for approximately 80ha of land over the Plan period.

In identifying a preferred range of future demand, NLP has drawn upon the four scenarios outlined above. These have been considered within the context of a variety of sensitivity tests, as well as the market intelligence gathered through both desk-based research and consultation with local agents, developers and economic stakeholders. Drawing all of this analysis together, it is recommended that BDC looks to allocate between 65ha and 100ha of employment land to 2033.

It is considered that provision for 65ha of employment land is likely to be adequate to meet indigenous demand over the Plan period. It is recognised, however, that Bolsover has successfully competed for a number of large, retail logistics developments in recent years and that, if a similar strategy is pursued moving forward, a larger supply of employment land will be required in order to enable the District to compete effectively for future opportunities.

Clearly, the extent to which Bolsover wishes to pursue such imported demand, which may generate relatively modest employment gains in comparison with the associated land take, is a policy decision to be taken by BDC. It is recommended that a decision regarding the overall level of demand to be pursued by the District is made within the context of other policy considerations, including planned levels of housing, retail and leisure growth.

An analysis of Bolsover’s development pipeline reveals that 9 sites – with the potential to provide 75.47ha of employment land – already have planning permission in place. These sites must be considered as part of the authority’s
forward supply. Clearly, this is sufficient to accommodate a project demand of 65ha – in quantitative terms at least – in the event that BDC decides to adopt a strategy of catering only for indigenous demand over the Plan period.

12.22 Should BDC opt to pursue a strategy that seeks to continue to compete for imported demand from the logistics and distribution sector, this level of supply would be insufficient to meet forecast need and further allocations would be required. Whilst the need for any such additional allocations remains unclear at present, it should be noted that the site assessments undertaken as part of this study have identified:

- A further ten allocated sites (totalling 17.04ha of land) that are considered suitable employment locations;
- Three unallocated sites that are considered to have good potential as future employment allocations;
  - Land East of Rotherham Road, New Houghton (22): totalling 6ha, it is understood that the site has been put to BDC as a potential mixed-use development comprising of 0.90ha of employment land. It is suggested that – subject to the overall demand-supply balance – BDC may wish to give consideration to allocating 0.90ha of employment land (possibly rising to as much as 2ha) in order to meet local need;
  - Bolsover Business Park, Bolsover (15): a 5.50ha site that includes a number of existing properties that are of varying quality but, nevertheless, are well occupied. It is suggested that – subject to the overall demand-supply balance – BDC may wish to give consideration to allocating 3.67ha of land for employment use, with a 1.83ha field adjacent to the Castle Arms public house remaining in agricultural use; and
  - Wincobank Farm, South Normanton (25): a 13.03ha site in a location that has historically proven attractive to larger occupiers. Should BDC decide to Plan on the basis of demand of 100ha, it is suggested that the authority may wish to give consideration to allocating land at Wincobank Farm – either in full or in part (with the remainder potentially being safeguarded for employment uses beyond the Plan period).

12.23 In pursuing a level of demand predicated on the District continuing to compete successfully for imported demand from the logistics and distribution sector, it will be important to ensure the availability of large sites with good strategic road access. A number of potential sites have been identified within this EDNA as offering some potential to accommodate demand from the sector, including: land at Seymour, Castlewood Business Park (north), Coalite and Wincobank Farm. It is recommended that BDC officers undertake further engagement with the relevant landowners and developers in order to determine the extent to which these sites can be relied upon to accommodate demand for large development plots.
12.24 In the event that such discussions do not give the Council the necessary confidence that the District is able to identify a small number of larger development plots in suitable locations, it may be necessary to give consideration to the need to allocate a single, large site capable of addressing this potential gap in the market. Such a response is likely to necessitate a rationalisation of the employment land portfolio – through the exclusion of some of the sites identified as suitable employment locations within this document – in order to protect against a significant oversupply of land.

12.25 Overall, and notwithstanding the above, it is considered that the sites assessed as part of this EDNA and considered suitable for employment use offer the opportunity to provide the District with a good range of sites (in terms of size and quality) that could adequately meet business needs and align well with the locations where demand is anticipated to be strongest moving forwards.

12.26 Whilst Bolsover is considered to have a good range of sites, without public sector funding it is likely to be challenging to bring forward a number of undeveloped sites in the east of the District. This, however, is a reflection of market conditions, rather than a reflection of any particular site specific issues. As such, there is considered to be little merit in de-allocating existing sites and replacing them with new allocations. East Bolsover is characterised by a series of localised markets that serve indigenous demand (with the exception of Brook Park). As a consequence, whilst this EDNA recognises the challenges to delivery in the area, it is considered important that the east of the District has a good geographical spread of employment sites. It is important that BDC continues to work with the D2N2 and Sheffield City Region LEPs and other organisations to explore opportunities to leverage in funding in order to support the delivery of employment sites across the District.
EDNA Consultees
A list of those consulted as part of the EDNA process is provided below.

Meetings and Telephone Interviews
Nick Chishchniak (Derbyshire and Nottinghamshire Chamber of Commerce)
Theresa Garrod (Bolsover District Council)
Robert Haigh (Fisher German)
Dee Hill (Derbyshire County Council Education)
Nicola Longson (NHS North Derbyshire Clinical Commissioning Group)
Mohammed Mahroof (Mark Jenkinson & Son)
Jean Richards (NHS Hardwick Clinical Commissioning Group)
Rebecca Schofield (Knight Frank)
Richard Thornton (Derbyshire County Council Early Years Education)
Ben White (Knight Frank)
Chris Wright (BB&J)

Workshop Attendees
Alison Barnfield (Waystone)
Jonathan Buckwell (DHA Planning, on behalf of Laing O’Rourke)
Nick Chishchniak (Derbyshire and Nottinghamshire Chamber of Commerce)
Sonia Coleman (Bolsover District Council)
Richard Cooper (North East Derbyshire District Council)
Tim Dawson (Bassetlaw District Council)
Phil Delany (Mansfield District Council)
Claire George (HCA)
Gareth Harry (NHS Hardwick Clinical Commissioning Group)
Jon Hendy (Bolsover District Council)
Stephen Jackson (Amber Valley District Council)
Paul McGrath (Bolsover District Council)
Councillor Duncan McGregor
Chris McKinney (Bolsover District Council)
Helen McLoughlin (Waystone)
Alan Morey (Chesterfield Borough Council)
Councillor Tom Munro
Ian Murray (Derbyshire Community Health Services NHS Foundation Trust)
Councillor Brian Murray-Carr
Neil Oxby (Ashfield District Council)
Richard Powell (Derbyshire County Council)
Adele Rhodes (Bolsover District Council)
Councillor Brian Watson
<table>
<thead>
<tr>
<th>Site Name</th>
<th>NLP Ref</th>
<th>L/A Ref</th>
<th>Area (ha)</th>
<th>Strategic Access</th>
<th>Proximity to Labour &amp; Services</th>
<th>Compatibility of Adjoining Uses</th>
<th>Development &amp; Environmental Constraints</th>
<th>Market Attractiveness</th>
<th>Total Score</th>
<th>Overall Site Grade</th>
<th>Planning Factors</th>
<th>Barriers to Delivery</th>
<th>Timescale for Delivery</th>
<th>Potential Uses</th>
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<td>1-B2</td>
<td>1.65</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>2</td>
<td>17</td>
<td>Average</td>
<td>Allocated site</td>
<td>Potentially some remediation work may need to be carried out</td>
<td>Short/medium term</td>
<td>B1c/B8</td>
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<td>4</td>
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<td>2</td>
<td>20</td>
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<td>3</td>
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<td>2</td>
<td>1</td>
<td>15</td>
<td>Average</td>
<td>Allocated site</td>
<td>Lack of market interest/ Strategic road access</td>
<td>Medium term</td>
<td>B1c/B2/B8</td>
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<td>3</td>
<td>1</td>
<td>13</td>
<td>Average</td>
<td>Allocated site</td>
<td>Lack of market interest/ Poor road access/Extant permission for alternative use (solar photo-voltaic farm)</td>
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<td>23</td>
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<td>2</td>
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<td>Medium term</td>
<td>B1 offices</td>
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<td>Portland Road / Vernon Street, Shirebrook</td>
<td>8</td>
<td>4-SH6</td>
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<td>3</td>
<td>4</td>
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<td>2</td>
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<td>Average</td>
<td>Allocated site</td>
<td>Lack of market interest/Poor Strategic road access</td>
<td>Medium/long term</td>
<td>B1c/B2/B8</td>
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<td>9</td>
<td>1-SN1</td>
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<td>4</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>24</td>
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<td>Allocated site</td>
<td>(for non-industrial employment)/Extant permission for B1 offices</td>
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<td>(for non-industrial employment)</td>
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<td>Medium term</td>
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<td>3</td>
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<td>3</td>
<td>17</td>
<td>Average</td>
<td>Allocated site</td>
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<td>Medium term</td>
<td>B1a/B1c</td>
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<td>1-W1</td>
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<td>1</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>10</td>
<td>Poor</td>
<td>Allocated site/Expired outline permission for B1/B2/B8</td>
<td>Lack of market interest/poor Strategic and local road access</td>
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<td>B1/B2/B8, bad neighbour uses</td>
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<td>1-W2</td>
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<td>1</td>
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<td>1</td>
<td>1</td>
<td>8</td>
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<td>Allocated site</td>
<td>Lack of market interest/Uneven ground/part of the site is a coalfield high risk area/poor (strategic and local) road access/site access issues</td>
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<td>B1/B2/B8</td>
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<tr>
<td>Site Name</td>
<td>NLP Ref</td>
<td>L/A Ref</td>
<td>Area (ha)</td>
<td>Strategic Access</td>
<td>Proximity to Labour &amp; Services</td>
<td>Compatibility &amp; Adjoining Uses</td>
<td>Development &amp; Environmental Constraints</td>
<td>Market Attractiveness</td>
<td>Total Score</td>
<td>Planning Factors</td>
<td>Barriers to Delivery</td>
<td>Timescale for Delivery</td>
<td>Potential Uses</td>
<td>Future Potential</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>---------</td>
<td>---------</td>
<td>-----------</td>
<td>------------------</td>
<td>-------------------------------</td>
<td>---------------------------------</td>
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<td>----------------------</td>
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<td>-------------------</td>
<td>-------------------</td>
<td>----------------------</td>
<td>----------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Land between Brickyard Farm and Barlborough Links</td>
<td>16</td>
<td>1-BAS</td>
<td>4.44</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>4</td>
<td>Good</td>
<td>Non allocated site/Expired outline permission for B1/B2/B8</td>
<td>Medium/long term</td>
<td>B2/B2/B8</td>
<td></td>
</tr>
<tr>
<td>Coalite, Bolsover</td>
<td>17</td>
<td>2-B5</td>
<td>26.73</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>5</td>
<td>Average</td>
<td>Non allocated site. Outline permission recently granted for major mixed use scheme, including B2/B8 accommodation and 795 new homes</td>
<td>Medium term</td>
<td>B2/B8</td>
<td></td>
</tr>
<tr>
<td>Land East of Bolsover</td>
<td>18</td>
<td>2-B6</td>
<td>1.96</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>Average</td>
<td>Non allocated site/site pass/permission for residential-led mixed-use scheme, including B1 accommodation</td>
<td>Medium term</td>
<td>B2a/B1c</td>
<td></td>
</tr>
<tr>
<td>Former Miners Welfare Club, Clowne</td>
<td>19</td>
<td>3-CLX</td>
<td>0.56</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>Average</td>
<td>Non allocated site</td>
<td>Medium term</td>
<td>B2a/B1c</td>
<td></td>
</tr>
<tr>
<td>Land North of Clowne</td>
<td>20</td>
<td>3-C12</td>
<td>66</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>Average</td>
<td>Non allocated site</td>
<td>Long term</td>
<td>B2a/B1c</td>
<td></td>
</tr>
<tr>
<td>Land at Seymour, part of Markham vale, near Woodthorp</td>
<td>21</td>
<td>1-C1</td>
<td>12.2</td>
<td>5</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>Good</td>
<td>Non allocated site</td>
<td>Short term</td>
<td>B2/B2/B8</td>
<td></td>
</tr>
<tr>
<td>Land East of Rotherham Road, New Houghton</td>
<td>22</td>
<td>NH1</td>
<td>0.9</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>Average</td>
<td>Non allocated site</td>
<td>Short/medium term</td>
<td>B2a/B1c</td>
<td></td>
</tr>
<tr>
<td>Portland Road, Shirebrook</td>
<td>23</td>
<td>1-SH7</td>
<td>2.11</td>
<td>1</td>
<td>4</td>
<td>5</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td>Average</td>
<td>Non allocated site</td>
<td>Medium/long term</td>
<td>B2a/B1c</td>
<td></td>
</tr>
<tr>
<td>Land to the rear of the Sycamores, Broadmeadows</td>
<td>24</td>
<td>1-SN17</td>
<td>1.16</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>Average</td>
<td>Non allocated site</td>
<td>Medium/long term</td>
<td>B2a/B1c</td>
<td></td>
</tr>
<tr>
<td>Wincobank Farm, South Normanton</td>
<td>25</td>
<td>1-SN7</td>
<td>13.03</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>Average</td>
<td>Non allocated site</td>
<td>Medium term</td>
<td>B8</td>
<td></td>
</tr>
<tr>
<td>Former Oxcroft disposal point, Mill Lane, Stanfree</td>
<td>26</td>
<td>5-C3</td>
<td>42.02</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>Average</td>
<td>Site has untapped coal reserves which may preclude B1-B8 development occurring here/Part of the site is a coalfield high risk area</td>
<td>Medium/long term</td>
<td>B2/bad</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 3
Oxford Economics Baseline Forecasts

The method used for re-categorising the Oxford Economics employment forecasts by sector into B class uses is summarised below.

<table>
<thead>
<tr>
<th>Experian Sector</th>
<th>Proportion of Jobs by Use Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>B1a/b Office</td>
</tr>
<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Mining &amp; Quarrying</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>100%</td>
</tr>
<tr>
<td>Utilities</td>
<td>55%</td>
</tr>
<tr>
<td>Construction</td>
<td>16%</td>
</tr>
<tr>
<td>Wholesale &amp; Retail</td>
<td>9%</td>
</tr>
<tr>
<td>Transportation &amp; Storage</td>
<td>63%</td>
</tr>
<tr>
<td>Accommodation &amp; Food Service Activities</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Information &amp; Communication</td>
<td>100%</td>
</tr>
<tr>
<td>Finance &amp; Insurance</td>
<td>100%</td>
</tr>
<tr>
<td>Real Estate Activities</td>
<td>100%</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Activities</td>
<td>87%</td>
</tr>
<tr>
<td>Administrative &amp; Support Service Activities</td>
<td>3%</td>
</tr>
<tr>
<td>Public Administration &amp; Defence</td>
<td>84%</td>
</tr>
<tr>
<td>Education</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Human Health &amp; Social Work Activities</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Arts, Entertainment &amp; Recreation</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Other Service Activities</td>
<td>Non-B Class</td>
</tr>
</tbody>
</table>
**Policy-On (FLUTE) Forecasts**

The method used for re-categorising the FLUTE model employment forecasts by sector into B class uses is summarised below.

<table>
<thead>
<tr>
<th>Experian Sector</th>
<th>Proportion of Jobs by Use Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>B1a/b Office</td>
</tr>
<tr>
<td>Advanced Manufacturing</td>
<td>0%</td>
</tr>
<tr>
<td>Medium-Low Tech Manufacturing</td>
<td>0%</td>
</tr>
<tr>
<td>Low Carbon</td>
<td>0%</td>
</tr>
<tr>
<td>Construction</td>
<td>0%</td>
</tr>
<tr>
<td>Logistics &amp; Transport</td>
<td>0%</td>
</tr>
<tr>
<td>Financial &amp; Professional Services</td>
<td>100%</td>
</tr>
<tr>
<td>Creative &amp; Digital Industries</td>
<td>88%*</td>
</tr>
<tr>
<td>Business Services</td>
<td>100%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>100%</td>
</tr>
<tr>
<td>Retail</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Sport, Leisure &amp; Tourism</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Health</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Education</td>
<td>Non-B Class</td>
</tr>
<tr>
<td>Other</td>
<td>Non-B Class</td>
</tr>
</tbody>
</table>

Figures marked with an * have been derived using an analysis of data from the Business Register and Employment Survey in order to ensure that the analysis reflects the structure of the local economy.
Defining the Knowledge Economy

The OECD definition of the knowledge economy is adopted by many practitioners when considering the issue of knowledge-based businesses. The OECD definition includes the Standard Industrial Classification (SIC) codes listed below:

221 : Publishing
642 : Telecommunications
651 : Monetary intermediation
652 : Other financial intermediation
660 : Insurance and pension funding, except compulsory social security
671 : Activities auxiliary to financial intermediation, except insurance and pension funding
672 : Activities auxiliary to insurance and pension funding
721 : Hardware consultancy
722 : Software consultancy and supply
723 : Data processing
724 : Database activities
726 : Other computer related activities
731 : Research and experimental development on natural sciences and engineering
732 : Research and experimental development on social sciences and humanities
741 : Legal, accounting, bookkeeping and auditing activities; tax consultancy; market research and public opinion polling; business and management consultancy; holdings
742 : Architectural and engineering activities and related technical consultancy
743 : Technical testing and analysis
744 : Advertising
745 : Labour recruitment and provision of personnel
748 : Miscellaneous business activities not elsewhere classified
751 : Administration of the State and the economic and social policy of the community
752 : Provision of services to the community as a whole
801 : Primary education
802 : Secondary Education
803 : Higher education
804 : Adult and other education
851 : Human health activities
852 : Veterinary activities
921 : Motion picture and video activities
922 : Radio and television activities
923 : Other entertainment activities
924 : News agency activities
925 : Library, archives, museums and other cultural activities
927 : Other recreational activities
Appendix 5
Oxford Economics Baseline Forecasts

The tables on the following pages provide a summary of the detailed SIC classifications contained within those sectors identified by Oxford Economics as most likely to drive employment growth in Bolsover over the Plan period.
### SECTION N Administrative and support service activities

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>77110</td>
<td>Renting and leasing of cars and light motor vehicles</td>
</tr>
<tr>
<td>77120</td>
<td>Renting and leasing of trucks and other heavy vehicles</td>
</tr>
<tr>
<td>77210</td>
<td>Renting and leasing of recreational and sports goods</td>
</tr>
<tr>
<td>77220</td>
<td>Renting of video tapes and disks</td>
</tr>
<tr>
<td>77291</td>
<td>Renting and leasing of media entertainment equipment</td>
</tr>
<tr>
<td>77299</td>
<td>Renting and leasing of other personal and household goods</td>
</tr>
<tr>
<td>77310</td>
<td>Renting and leasing of agricultural machinery and equipment</td>
</tr>
<tr>
<td>77320</td>
<td>Renting and leasing of construction and civil engineering machinery and equipment</td>
</tr>
<tr>
<td>77330</td>
<td>Renting and leasing of office machinery and equipment (including computers)</td>
</tr>
<tr>
<td>77341</td>
<td>Renting and leasing of passenger water transport equipment</td>
</tr>
<tr>
<td>77342</td>
<td>Renting and leasing of freight water transport equipment</td>
</tr>
<tr>
<td>77351</td>
<td>Renting and leasing of air passenger transport equipment</td>
</tr>
<tr>
<td>77352</td>
<td>Renting and leasing of freight air transport equipment</td>
</tr>
<tr>
<td>77390</td>
<td>Renting and leasing of other machinery, equipment and tangible goods n.e.c.</td>
</tr>
<tr>
<td>77400</td>
<td>Leasing of intellectual property and similar products, except copyright works</td>
</tr>
<tr>
<td>78101</td>
<td>Motion picture, television and other theatrical casting activities</td>
</tr>
<tr>
<td>78109</td>
<td>Other activities of employment placement agencies</td>
</tr>
<tr>
<td>78200</td>
<td>Temporary employment agency activities</td>
</tr>
<tr>
<td>78300</td>
<td>Human resources provision and management of human resources functions</td>
</tr>
<tr>
<td>79110</td>
<td>Travel agency activities</td>
</tr>
<tr>
<td>79120</td>
<td>Tour operator activities</td>
</tr>
<tr>
<td>79901</td>
<td>Activities of tourist guides</td>
</tr>
<tr>
<td>79909</td>
<td>Other reservation service activities n.e.c.</td>
</tr>
<tr>
<td>80100</td>
<td>Private security activities</td>
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<tr>
<td>80200</td>
<td>Security systems service activities</td>
</tr>
<tr>
<td>80300</td>
<td>Investigation activities</td>
</tr>
<tr>
<td>81100</td>
<td>Combined facilities support activities</td>
</tr>
<tr>
<td>81210</td>
<td>General cleaning of buildings</td>
</tr>
<tr>
<td>81221</td>
<td>Window cleaning services</td>
</tr>
<tr>
<td>81222</td>
<td>Specialised cleaning services</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------------------------------------</td>
</tr>
<tr>
<td>81223</td>
<td>Furnace and chimney cleaning services</td>
</tr>
<tr>
<td>81229</td>
<td>Other building and industrial cleaning activities</td>
</tr>
<tr>
<td>81291</td>
<td>Disinfecting and exterminating services</td>
</tr>
<tr>
<td>81299</td>
<td>Other cleaning services</td>
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<tr>
<td>81300</td>
<td>Landscape service activities</td>
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<tr>
<td>82110</td>
<td>Combined office administrative service activities</td>
</tr>
<tr>
<td>82190</td>
<td>Photocopying, document preparation and other specialised office support activities</td>
</tr>
<tr>
<td>82200</td>
<td>Activities of call centres</td>
</tr>
<tr>
<td>82301</td>
<td>Activities of exhibition and fair organisers</td>
</tr>
<tr>
<td>82302</td>
<td>Activities of conference organisers</td>
</tr>
<tr>
<td>82911</td>
<td>Activities of collection agencies</td>
</tr>
<tr>
<td>82912</td>
<td>Activities of credit bureaus</td>
</tr>
<tr>
<td>82920</td>
<td>Packaging activities</td>
</tr>
<tr>
<td>82990</td>
<td>Other business support service activities n.e.c.</td>
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### SECTION F Construction

<table>
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<th>Description</th>
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<tbody>
<tr>
<td>41100</td>
<td>Development of building projects</td>
</tr>
<tr>
<td>41201</td>
<td>Construction of commercial buildings</td>
</tr>
<tr>
<td>41202</td>
<td>Construction of domestic buildings</td>
</tr>
<tr>
<td>42110</td>
<td>Construction of roads and motorways</td>
</tr>
<tr>
<td>42120</td>
<td>Construction of railways and underground railways</td>
</tr>
<tr>
<td>42130</td>
<td>Construction of bridges and tunnels</td>
</tr>
<tr>
<td>42210</td>
<td>Construction of utility projects for fluids</td>
</tr>
<tr>
<td>42220</td>
<td>Construction of utility projects for electricity and telecommunications</td>
</tr>
<tr>
<td>42910</td>
<td>Construction of water projects</td>
</tr>
<tr>
<td>42990</td>
<td>Construction of other civil engineering projects n.e.c.</td>
</tr>
<tr>
<td>43110</td>
<td>Demolition</td>
</tr>
<tr>
<td>43120</td>
<td>Site preparation</td>
</tr>
<tr>
<td>43130</td>
<td>Test drilling and boring</td>
</tr>
<tr>
<td>43210</td>
<td>Electrical installation</td>
</tr>
<tr>
<td>43220</td>
<td>Plumbing, heat and air-conditioning installation</td>
</tr>
<tr>
<td>43290</td>
<td>Other construction installation</td>
</tr>
<tr>
<td>43310</td>
<td>Plastering</td>
</tr>
<tr>
<td>43320</td>
<td>Joinery installation</td>
</tr>
<tr>
<td>43330</td>
<td>Floor and wall covering</td>
</tr>
<tr>
<td>43341</td>
<td>Painting</td>
</tr>
<tr>
<td>43342</td>
<td>Glazing</td>
</tr>
<tr>
<td>43390</td>
<td>Other building completion and finishing</td>
</tr>
<tr>
<td>43910</td>
<td>Roofing activities</td>
</tr>
<tr>
<td>43991</td>
<td>Scaffold erection</td>
</tr>
<tr>
<td>43999</td>
<td>Other specialised construction activities n.e.c.</td>
</tr>
</tbody>
</table>
SECTION M Professional, scientific and technical activities

<table>
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<th>Description</th>
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<tbody>
<tr>
<td>69101</td>
<td>Barristers at law</td>
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<tr>
<td>69102</td>
<td>Solicitors</td>
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<tr>
<td>69109</td>
<td>Activities of patent and copyright agents; other legal activities n.e.c.</td>
</tr>
<tr>
<td>69201</td>
<td>Accounting and auditing activities</td>
</tr>
<tr>
<td>69202</td>
<td>Bookkeeping activities</td>
</tr>
<tr>
<td>69203</td>
<td>Tax consultancy</td>
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<tr>
<td>70100</td>
<td>Activities of head offices</td>
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<tr>
<td>70210</td>
<td>Public relations and communications activities</td>
</tr>
<tr>
<td>70221</td>
<td>Financial management</td>
</tr>
<tr>
<td>70229</td>
<td>Management consultancy activities other than financial management</td>
</tr>
<tr>
<td>71111</td>
<td>Architectural activities</td>
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<tr>
<td>71121</td>
<td>Urban planning and landscape architectural activities</td>
</tr>
<tr>
<td>71122</td>
<td>Engineering related scientific and technical consulting activities</td>
</tr>
<tr>
<td>71129</td>
<td>Other engineering activities</td>
</tr>
<tr>
<td>71200</td>
<td>Technical testing and analysis</td>
</tr>
<tr>
<td>72110</td>
<td>Research and experimental development on biotechnology</td>
</tr>
<tr>
<td>72190</td>
<td>Other research and experimental development on natural sciences and engineering</td>
</tr>
<tr>
<td>72200</td>
<td>Research and experimental development on social sciences and humanities</td>
</tr>
<tr>
<td>73110</td>
<td>Advertising agencies</td>
</tr>
<tr>
<td>73120</td>
<td>Media representation services</td>
</tr>
<tr>
<td>73200</td>
<td>Market research and public opinion polling</td>
</tr>
<tr>
<td>74100</td>
<td>Specialised design activities</td>
</tr>
<tr>
<td>74201</td>
<td>Portrait photographic activities</td>
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<tr>
<td>74202</td>
<td>Other specialist photography</td>
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<tr>
<td>74203</td>
<td>Film processing</td>
</tr>
<tr>
<td>74209</td>
<td>Photographic activities not elsewhere classified</td>
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<tr>
<td>74300</td>
<td>Translation and interpretation activities</td>
</tr>
<tr>
<td>74901</td>
<td>Environmental consulting activities</td>
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<tr>
<td>74902</td>
<td>Quantity surveying activities</td>
</tr>
<tr>
<td>74909</td>
<td>Other professional, scientific and technical activities n.e.c.</td>
</tr>
<tr>
<td>74990</td>
<td>Non-trading company non trading</td>
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<tr>
<td>75000</td>
<td>Veterinary activities</td>
</tr>
</tbody>
</table>
### SECTION J Information and communication

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>58110</td>
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</tr>
<tr>
<td>58120</td>
<td>Publishing of directories and mailing lists</td>
</tr>
<tr>
<td>58130</td>
<td>Publishing of newspapers</td>
</tr>
<tr>
<td>58141</td>
<td>Publishing of learned journals</td>
</tr>
<tr>
<td>58142</td>
<td>Publishing of consumer and business journals and periodicals</td>
</tr>
<tr>
<td>58190</td>
<td>Other publishing activities</td>
</tr>
<tr>
<td>58210</td>
<td>Publishing of computer games</td>
</tr>
<tr>
<td>58290</td>
<td>Other software publishing</td>
</tr>
<tr>
<td>59111</td>
<td>Motion picture production activities</td>
</tr>
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<td>Sound recording and music publishing activities</td>
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<td>News agency activities</td>
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### SECTION Q Human health and social work activities

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<th>Code</th>
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<td>Residential care activities for learning difficulties, mental health and substance abuse</td>
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<td>Social work activities without accommodation for the elderly and disabled</td>
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</table>
Policy-On (FLUTE) Forecasts

The text below provides a summary of the detailed SIC classifications contained within each of the key sectors contained within the FLUTE model.

Medium – Low Tech Manufacturing
10 : Manufacture of food products
11 : Manufacture of beverages
12 : Manufacture of tobacco products
13 : Manufacture of textiles
14 : Manufacture of wearing apparel
15 : Manufacture of leather and related products
16 : Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
17 : Manufacture of paper and paper products
310 : Manufacture of furniture
323 : Manufacture of sports goods
324 : Manufacture of games and toys
329 : Other manufacturing
19 : Manufacture of coke and refined petroleum products
22 : Manufacture of rubber and plastic products
23 : Manufacture of other non-metallic mineral products
24 : Manufacture of basic metals
251 : Manufacture of structural metal products
252 : Manufacture of tanks, reservoirs and containers of metal
253 : Manufacture of steam generators, except central heating hot water boilers
255 : Forging, pressing, stamping and roll-forming of metal; powder metallurgy
256 : Treatment and coating of metals; machining
257 : Manufacture of cutlery, tools and general hardware
259 : Manufacture of other fabricated metal products
301 : Building of ships and boats
331 : Repair of fabricated metal products, machinery and equipment
332 : Installation of industrial machinery and equipment

Advanced Manufacturing
20 : Manufacture of chemicals and chemical products
254 : Manufacture of weapons and ammunition
27 : Manufacture of electrical equipment
28 : Manufacture of machinery and equipment n.e.c.
29 : Manufacture of motor vehicles, trailers and semi-trailers
302 : Manufacture of railway locomotives and rolling stock
303 : Manufacture of air and spacecraft and related machinery
304 : Manufacture of military fighting vehicles
309 : Manufacture of transport equipment n.e.c.
7112 : Engineering activities and related technical consultancy
7219 : Other research and experimental development on natural sciences and engineering (50%)
Creative and Digital Industries (CDI)
261 : Manufacture of electronic components and boards
262 : Manufacture of computers and peripheral equipment
263 : Manufacture of communication equipment
264 : Manufacture of consumer electronics
265 : Manufacture of instruments and appliances for measuring, testing and navigation; watches and clocks
61 : Telecommunications
62 : Computer programming, consultancy and related activities
631 : Data processing, hosting and related activities; web portals
639 : Other information service activities
321 : Manufacture of jewellery, bijouterie and related articles
322 : Manufacture of musical instruments
181 : Printing and service activities related to printing
182 : Reproduction of recorded media
58 : Publishing activities
59 : Motion picture, video and television programme production, sound recording and music publishing activities
60 : Programming and broadcasting activities
7111 : Architectural activities
7220 : Research and experimental development on social sciences and humanities
731 : Advertising
732 : Market research and public opinion polling
741 : Specialised design activities
742 : Photographic activities
743 : Translation and interpretation activities
749 : Other professional, scientific and technical activities n.e.c. (40%)
900 : Creative, arts and entertainment activities
951 : Repair of computers and communication equipment
952 : Repair of personal and household goods

Low Carbon
351 : Electric power generation, transmission and distribution
352 : Manufacture of gas; distribution of gaseous fuels through mains
360 : Water collection, treatment and supply
381 : Waste collection
382 : Waste treatment and disposal
383 : Materials recovery
390 : Remediation activities and other waste management services
712 : Technical testing and analysis
7219 : Other research and experimental development on natural sciences and engineering (50%)
749 : Other professional, scientific and technical activities n.e.c. (20%)
4677 : Wholesale of waste and scrap
Logistics
492 : Freight rail transport
494 : Freight transport by road and removal services
502 : Sea and coastal freight water transport
504 : Inland freight water transport
512 : Freight air transport and space transport
521 : Warehousing and storage
522 : Support activities for transportation (25%)
531 : Postal activities under universal service obligation
532 : Other postal and courier activities

Leisure, Tourism and Sport
55 : Accommodation
56 : Food and beverage service activities
799 : Other reservation service and related activities
910 : Libraries, archives, museums and other cultural activities
931 : Sports activities
932 : Amusement and recreation activities

Business Services (BS)
78 : Employment activities
82 : Office administrative, office support and other business support activities
941 : Activities of business, employers and professional membership organisations

Financial and Professional Services (FPS)
64 : Financial service activities, except insurance and pension funding
65 : Insurance, reinsurance and pension funding, except compulsory social security
66 : Activities auxiliary to financial services and insurance activities
691 : Legal activities
692 : Accounting, bookkeeping and auditing activities; tax consultancy
701 : Activities of head offices
702 : Management consultancy activities
749 : Other professional, scientific and technical activities n.e.c. (40%)

Public Administration
O : Public administration and defence

Education
P : Education

Health and Care
N : Health and social work

Construction
F : Construction

Retail
47 : Retail trade, except of motor vehicles and motorcycles
(compatible with SIC 52 in 2003 and 1992 SIC Codes)

Other
All remaining employment