



MID SUSSEX DISTRICT COUNCIL

Strategic Employment Land Availability Assessment

Date: May 2016

IT'S ALL IN THE DETAIL



CHILMARK
CONSULTING

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1. INTRODUCTION

Overview

- 1.1 Chilmark Consulting Ltd. (CCL) was commissioned in December 2015 by Mid Sussex District Council to prepare a *Strategic Employment Land Availability Assessment* (SELAA) covering the District, but excluding the South Downs National Park area.
- 1.2 This Report sets out the analysis and findings of the work and forms part of the evidence base for the Mid Sussex District Plan 2014 – 31.

Economic Growth and Development

- 1.3 The economic potential of Mid Sussex is supported through a range of strategic policy measures. This includes the Greater Brighton City Deal that was approved by Government in March 2014. The City Deal area includes Mid Sussex District. One of the critical matters is to tackle the shortage of suitable employment floorspace and business accommodation in Brighton's technology cluster and ensure that the most promising businesses are able to grow in the City Deal area.
- 1.4 Alongside the City Deal is the Coast to Capital Local Enterprise Partnership (C2CLEP). This encompasses

Brighton & Hove, Croydon, the Gatwick Diamond, East Surrey, Lewes and West Sussex. The area includes over 1.9m people and more than 85,000 businesses with 776,000 jobs.

- 1.5 The C2CLEP will be delivering a Growth Deal totalling £202 million from Government's Local Growth Fund to deliver the Strategic Economic Plan. The Government investment is anticipated to stimulate a further £240 million of additional investment from local partners and the private sector. Under the Growth Deal the investments will create at least 14,000 new jobs and allow 5,000 new homes to be completed contributing towards the 100,000 new homes over the 25-year target. The Growth Deal is expected to create 5,000 new jobs, 5,040 new homes and 200,000 sq.m of employment space in the Burgess Hill area within Mid Sussex.
- 1.6 Analysis to support the above policy interventions has been provided through the *Northern West Sussex Economic Growth Assessment* (April 2014) (EGA). This study focused on the employment space needs of the B Use Class sectors but also considered future projections for growth in non-B Class sectors. The EGA emphasises that the property market in Northern West Sussex is relatively insular and self-contained. Enquiries for business floorspace tend to originate from within the sub-region with Crawley the notable exception, particularly at Manor Royal.
- 1.7 For Mid Sussex District, the EGA identified that business services, health, education, retail and accommodation /food services are the principal economic sectors. 20%

of jobs are in the public sector. The EGA concluded that there is a need for an estimated 30.7 hectares of additional employment land under a baseline job growth scenario to 2031, and indicated that there is an under-supply of employment land to meet such need.

- 1.8 The EGA also identified qualitative concerns highlighting the relatively old stock and limited new development employment floorspace across different parts of the District. It noted the lack of available land supply to ensure quality and choice for the market and was concerned that there is an increasing risk that without intervention the District's ability to accommodate indigenous expansion and new inward investment will be undermined.
- 1.9 The *Burgess Hill Strategic Employment Site Study (2015)* identified an updated employment land need for the District in a range from 19.1 Ha to 31 Ha over the period 2014 – 2031. The report concluded that, including a contribution towards helping meet the un-met employment land needs of other, neighbouring local authorities, there was an economic demand requirement for some 25 – 30 hectares of additional employment land.
- 1.10 The District's future job creation target is set out in the draft policy DP2 (Sustainable Economic Development) of the *District Plan: Focused Amendments*, November 2015. The revised employment target is for 330 new jobs per annum over the plan period (5,610 net new jobs).

Purpose and Scope

- 1.11 The purpose of the SELAA is to examine the availability and potential supply of B Use Class employment sites and floorspace for Mid Sussex outside the South Downs National Park area in the District Plan period to 2031.
- 1.12 The SELAA advises the District Council on the adequacy of the employment land supply in the District, particularly in terms of having a continuous five-year supply of high quality sites available. The work includes the identification, interrogation and assessment of suitable employment sites to meet economic demands and conclusions / recommendations on site availability and achievability.
- 1.13 It is not the role of the SELAA to examine or update employment land demand or needs.
- 1.14 Critically, the report does not constitute any formal proposals for the identification or allocation of any employment land. It offers an analysis and assessment as part of the plan-making evidence base.
- 1.15 The allocation or designation of employment land is a matter for the District Plan process to perform where other matters such as spatial patterns of development, the balance of housing and employment growth and the achievement of sustainable development coupled with the identification of infrastructure requirements can be effectively synthesised.
- 1.16 The SELAA therefore ensures that, together with other existing employment land demand and supply evidence,

the District Council is fully equipped to address the range of employment land issues required by the *National Planning Policy Framework (NPPF)* and the *National Planning Practice Guidance (NPPG)*.

1.17 The scope of the work is to:

- form an **Economic Land Availability Assessment** in accordance with the *National Planning Practice Guidance*;
- identify a future supply of land which is suitable, available and achievable for economic development uses;
- identify sites and broad locations with potential for development; assess their development potential; assess suitability for development and the likelihood of development coming forward;
- cover the Mid Sussex District Plan area; and
- focus on land supply for B-class employment floorspace for the sectors outlined below:
 - B1 Business (offices, research & development, light industry);
 - B2 General Industrial; and
 - B8 Storage or Distribution (wholesale warehouses, distribution centres).

1.18 In addition, the requirement is to assess sites of 0.25ha (or 500 sq.m of floor space) and above. Any submitted site/s

that fails to meet these criteria are excluded from the SELAA assessment.

Report Structure

1.19 Following this introductory section, the Report is structured as follows:

- **Section 2:** summarises the relevant strategic and local policy context;
- **Section 3:** details the method and approach to the SELAA and particularly shows how the various elements of the identification and assessment of existing and potential sites has been conducted;
- **Section 4:** provides the assessment of employment land supply and sets out the principal analysis and findings; and
- **Section 5:** draws the work together summarising the conclusions and recommendations;
- **Appendix 1** – Site Assessment Indicator Descriptions – a more detailed list and explanatory of relevant site assessment indicators used in the Site Evaluation Framework;
- **Appendix 2** – Site Assessment Framework – provides the full assessment of sites showing the analysis of each site against the defined indicators;
- **Appendix 3** – provides detailed maps of each site included in the Site Survey Assessment.

2. PLANNING AND ECONOMIC POLICY CONTEXT

Introduction

- 2.1 The employment land and planning policy context is an important contextual component in understanding the supply and potential availability of employment land in Mid Sussex.
- 2.2 This section sets out, in summary, the most relevant economic and planning policy context for the SELAA.

National Planning Policy

National Planning Policy Framework (NPPF)

- 2.3 The *National Planning Policy Framework* (NPPF) has placed economic growth at the heart of its definition of sustainable development.
- 2.4 Paragraph 7 identifies the three dimensions to sustainable development: economic, social and environmental. This establishes the need for:
- “an economic role - 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”.

- 2.5 Paragraph 9 confirms that sustainable development involves seeking positive improvements in the quality of the built, natural and historic environment, including:

“making it easier for jobs to be created in cities, towns and villages”.

- 2.6 Paragraph 14, 1st bullet point, describes what the presumption in favour of sustainable development means. For plan-making, it establishes a positive approach:

“Local planning authorities should positively seek opportunities to meet the development needs of their area”.

- 2.7 Further clarification is provided through the core planning principles set out at Paragraph 17 of the NPPF. At the 3rd bullet point it includes the following important requirement that planning should:

“Proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities

for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities”.

2.8 The main economic development and business requirements of the NPPF are set out in paragraphs 20, 21 and 160. They can be summarised as:

- **planning proactively to meet the development needs of business and support an economy fit for the 21st Century;**
- **setting out a clear economic vision and strategy for the area which positively and proactively encourages sustainable growth;**
- **include the whole economy and up-to-date market demand/supply intelligence and evidence as the basis for the strategy;**
- **include neighbouring areas through the Duty to Co-operate. Economic issues straddle and affect adjacent districts/boroughs and need to include other authorities and the relevant LEP;**
- **engage with the business community to understand their changing needs and identify / address barriers to investment;**

- **identify strategic sites for local and inward investment to match the strategy and meet anticipated needs in the plan period;**
- **consider the role of land for economic development purposes and review land availability for economic purposes as well as its ability to meet other functions; and**
- **ensure that there is an emphasis on the viability of plans that must be deliverable.**

2.9 The NPPF is concerned with far more than simply the supply of property, land and sites to support economic growth. It supports proposals that address the whole economy in a positive and proactive manner that encourages economic prosperity as part of sustainable development.

2.10 The emphasis is on creating and securing jobs through the best use of land and sites that are most appropriate to foster economic development. The Framework recognises the importance of mixed use-development and the re-use, for other activities, of former employment land/sites that are no longer able to meet economic development needs.

2.11 The NPPF does not include a prescriptive approach with respect to the provision of B Use Class employment floorspace. Paragraph 38 for example encourages a mix of uses for larger residential schemes including opportunities to work on-site with the emphasis on offering a range of employment opportunities.

2.12 The NPPF identifies that supporting growing economic sectors includes removing barriers to sustainable growth including the quality of labour force, access to skills and education/training, accessibility to markets and the quality and choice of housing provision.

National Planning Practice Guidance (NPPG)

2.13 Following the NPPF, the *National Planning Practice Guidance* (NPPG) was published in March 2014 as an online resource offering advice and guidance on a range of planning and development matters.

2.14 Section 2a of the NPPG is concerned with housing and economic development needs assessments. A number of sub-sections and paragraphs are relevant to the consideration of potential employment land allocations and development, as follows.

2.15 Paragraph 008 recognises that there are economic market segments and that not all types of economic development will have the same appeal for different occupants. Effectively the NPPG is indicating the need to ensure that there is market choice.

2.16 In paragraph 030 of Section 2a, the Guidance notes that plan-makers should consider:

- recent patterns of employment land supply and loss to other uses;
- market intelligence and market signals;

- the existing stock of employment land indicating the demand for and supply of employment land and recognising that existing stock may not reflect the future needs of business; and
- take-up of sites and other data on availability and vacancies is to be used to understand the spatial implications of 'revealed' demand for employment land.

2.17 Paragraph 030 continues advising that the location and premises requirements of particular types of business will be important. The Guidance also highlights the need to identify over-supply or evidence of market failure (where physical or ownership constraints prevent employment sites from being used effectively).

2.18 Paragraphs 031 – 033 establish how employment land requirements should be considered based on historic, current and forecast future trends. In particular, the Guidance anticipates that the available stock of land should be compared with the particular requirements of the area in order to reflect the increasing diversity of employment generating uses. The Guidance emphasises the importance of mixed-use development and the provision of a variety of employment sites.

2.19 Paragraph 033 is concerned with forecasting future economic trends with the key output being an estimate of the scale of future needs broken down by economic sectors. The available stock of employment land should be compared with the particular requirements of the area so that any gaps in provision can be identified.

- 2.20 Employment land requirements are to be considered through four key relationships according to paragraph 034, namely:
- Standard Industrial Classification (SIC) sectors to Use Classes;
 - SIC to types of property;
 - employment to floorspace (employment density); and
 - floorspace to site area (plot ratio based on industry proxies).
- 2.21 Section 3 of the NPPG deals with housing and economic land availability assessments. Paragraph 001 highlights the importance of identifying a future supply of land that is suitable, available and achievable for housing and economic development uses over the plan period. The approach advocated includes assessing site suitability for employment development and the likelihood of development coming forward.
- 2.22 At Section 3, paragraph 3 the NPPG advises that previously allocated employment (and housing) land should be re-appraised as it may be necessary to assess whether circumstances have changed which would alter their suitability for economic development.
- 2.23 The approach and method adopted in this SELAA aligns with the requirements of the NPPG and follows the method set out therein with respect to establishing and assessing existing and potential future employment land availability.

Regional and Local

Coast to Capital LEP: Strategic Economic Plan (SEP)

- 2.24 The Coast to Capital Local Enterprise Partnership (C2C LEP) published its *Strategic Economic Plan* (SEP) in March 2014 identifying its vision, objectives and critical elements of land, property and infrastructure that are necessary to secure economic growth and to support new public funding from Government.
- 2.25 The Coast to Capital Local Enterprise Partnership encompasses Brighton & Hove, Croydon, the Gatwick Diamond, East Surrey, Lewes and West Sussex. The area includes over 1.9m people and more than 85,000 businesses with 776,000 jobs.
- 2.26 The *Coast to Capital Growth Deal* was published on 7th July 2014 with the aim of encouraging growth across the Coast to Capital region through targeted investment in infrastructure and innovation. The Growth Deal totals £202 million from the Government's Local Growth Fund to deliver the *Strategic Economic Plan*.
- 2.27 Under the Growth Deal the investments will create at least 14,000 new jobs and allow 5,000 new homes to be completed contributing towards the 100,000 new homes over 25-year target.
- 2.28 The SEP establishes six strategic priorities:
1. Successful growth locations, including transport investment;

2. Successful businesses;
3. Building competitive advantage;
4. Skills and workforce;
5. Growth is digital; and
6. Housing and infrastructure.

2.29 Of these strategic priorities, the most relevant to the SELAA are:

- **1. Successful growth locations and transport infrastructure** – this priority seeks to bring forward a programme of investment in transport infrastructure; to deliver interventions in brownfield and greenfield sites which will provide the capacity for employment and housing growth. The priority identifies that strategic business and employment locations are not homogenous and comprise a mix of strategic corridors, cities, towns and strategic sites. Burgess Hill is identified as one of these strategic business and employment locations.
- **3. Build competitive advantage** – this priority identifies that the LEP will focus on economic sectors where there is a competitive advantage. These are listed as: creative digital and IT; advanced engineering (including marine and automotive); environmental technologies (low carbon and renewables); business and financial services; and healthcare and life sciences. Food production and tourism are also noted as important sectors for some parts of the LEP.

Greater Brighton City Deal

2.30 The Greater Brighton City Deal (March 2014) (which includes Mid Sussex District) has subsequently secured a significant funding settlement with Government that supports a substantial programme of infrastructure and development investment aligned with the LEP's Strategic Plan, including works necessary to support a Science Park development.

2.31 Under the Deal agreed with Government, £165 million of investment across Greater Brighton is envisaged in the medium term to create a network of Growth Centres in key locations. This is to allow the Brighton economy to expand beyond the limitations imposed by the City's physical restrictions and lack of available employment sites and floorspace.

2.32 The identified Growth Centres include a new Business and Science Park at Burgess Hill (as set out on page 8 of the City Deal agreement). The City Deal recognises the importance of ensuring that economic growth opportunities are captured within the local area and that there are distinct benefits arising for all partners to the City Deal.

Mid Sussex Local Plan, 2004

2.33 The local development plan policy context is established by the saved policies of the *Mid Sussex Local Plan (2004)* together with the made (i.e. adopted) Neighbourhood Plans.

- 2.34 The emerging draft policies of the *Mid Sussex District Plan, 2031* (November 2015), together with draft, pre-referenda Neighbourhood Plans are also important, albeit with more limited weight given that these plans are not yet fully tested at examination or adopted.
- 2.35 The *Mid Sussex Local Plan* was adopted on 7th May 2004. A number of policies were saved by direction of the Secretary of State in September 2007 and remain relevant to the SELAA particularly with respect to the protection of landscape character (including the South Downs National Park and High Weald Area of Outstanding Natural Beauty); the capacity for new development outside settlement boundaries; the protection of strategic and local gaps to avoid settlement coalescence and loss of identity; and protection for environmental assets of international, national and local importance.
- 2.36 At the time of writing there are nine ‘made’ Neighbourhood Plans in the District. The District Council anticipates that further Neighbourhood Plans will be made in the short term and expects to see almost complete coverage of the District by Neighbourhood Plans in due course.
- 2.37 The individual Neighbourhood Plans’ policies are not set out in detail herein but when they are made they form part of the Development Plan for the District and are material considerations in plan-making and decision-taking. The Employment Sites Survey Assessment has identified a number of existing and potential employment sites that have been allocated through relevant Neighbourhood Plans.

Draft Mid Sussex District Plan, 2031

- 2.38 The *Mid Sussex District Plan 2014 – 2031: Pre Submission Draft* was published in June 2015 with a further Focused Amendments Plan published for consultation in November 2015.
- 2.39 The Pre-Submission Draft Plan confirms the overall vision and strategic objectives in Chapter 2. The Vision is:
- “A thriving and attractive District, a desirable place to live, work and visit. Our aim is to maintain, and where possible, improve the social, economic and environmental well-being of our District and the quality of life for all now and in the future”.*
- 2.40 The vision is underpinned by four priority themes that support a series of fifteen Strategic Objectives. The most relevant Objectives for this SELAA include:
- **SO2.** To promote well located and designed development that reflects the District’s distinctive towns and villages, retains their separate identity and character and prevents coalescence
 - **SO3.** To protect valued landscapes for their visual, historical and biodiversity qualities
 - **SO6.** To ensure that development is accompanied by the necessary infrastructure in the right place at the right time that supports development and sustainable communities. This includes the provision of efficient and sustainable transport networks;

- **S07.** To promote a place which is attractive to a full range of businesses, and where local enterprise thrives;
 - **S08.** To provide opportunities for people to live and work within their communities, reducing the need for commuting.
- 2.41 Paragraphs 3.4 and 3.5 highlight the high quality, valued environment of Mid Sussex and notes the importance of the countryside in offering a wide range of social, economic and environmental benefits. The paragraph emphasises that the location, nature and quality of new development is therefore of the utmost importance to ensure that this environment is protected and enhanced where possible.
- 2.42 Paragraph 3.5 continues referencing work undertaken by advisers Land Use Consultants for the Council to identify the District's capacity to accommodate new development. It notes the key findings in terms of the heavily constrained nature of much of the District by environmental and landscape/attractive countryside designations, with some two-thirds of the District covered by 'primary' constraints to development such as the South Downs National Park and the High Weald Area of Outstanding Natural Beauty (AoNB). Secondary constraints in terms of areas that are sensitive to development pressures are also identified as informing the overall, proposed spatial strategy and levels of development.
- 2.43 Paragraph 3.8 identifies the location of Mid Sussex within the Gatwick Diamond as offering the potential to enhance the economic prosperity of the area. It states that the Draft Plan promotes strategic development at Burgess Hill and includes proposals for high quality employment floorspace to enable the towns of Mid Sussex to become more sustainable and to boost the area's economy.
- 2.44 Paragraph 3.19 notes that the strategy will seek to locate homes and employment opportunities as part of development at Burgess Hill. Work has progressed to develop 3,500 – 4,000 new homes to the north and north west of the town alongside new employment development.
- 2.45 Policy DP2 (Sustainable Economic Development) – supports the creation of some 278 jobs per annum in the plan period (the policy has subsequently been amended in the Focused Amendments to 330 new jobs per annum). This is to be achieved through: encouraging high quality development of land and premises; supporting existing businesses and allowing them room to expand; encouraging inward investment and the promotion and expansion of clusters/networks of knowledge, creative and high technology industries; seeking the provision of infrastructure to support business growth. In particular, the policy identifies the allocation of 20-30 hectares of land as a high quality business park at Burgess Hill to the east of Cuckfield Road. The policy also sets out that the development of a Science and Technology Park has been proposed to support research and development and to provide employment for the wider areas. The policy

highlights that a broad location (indicated on the Policies Map) to the west of Burgess Hill has been identified in the Coast to Capital LEP SEP for the Science Park.

- 2.46 Policy DP7 (General Principles for Strategic Development at Burgess Hill) – this policy is concerned with establishing the over-arching principles for growth and development in Burgess Hill. It sets out a range of principles, including: the provision of additional, high quality employment opportunities including business and science park developments; improvements to public transport, walking and cycling; transport improvements that take account of the wider impact of the development on the surrounding area; and highway improvements in and around Burgess Hill to address limitations of east-west movement through the town.
- 2.47 Policy DP10 (Protection and Enhancement of the Countryside) – the draft policy sets out that the countryside will be valued for its own sake, recognising its intrinsic character and beauty. Development outside built-up area boundaries is permitted subject to maintaining or enhancing the quality of the rural and landscape character of the District; and if it is necessary for agriculture, supported by a specific policy reference in the Plan or Neighbourhood Plan. The policy notes the evidence base contained in the *Landscape Character Assessment* and the *Capacity of Mid Sussex District to Accommodate Development Study* in order to assess the impact of development proposals on the quality of rural and landscape character.

- 2.48 Policy DP11 (Preventing Coalescence) – continues the approach taken in the Adopted Local Plan stressing the importance of maintaining the separate identity of each settlement in the District. Development is permitted if it does not result in the coalescence of settlements which harms the separate identity and amenity of settlements and if it would not have an unacceptable urbanising effect on the areas between settlements. The policy identifies that Local Gaps can also be created through other Development Plan Documents or Neighbourhood Plans based on objective evidence and a demonstration that existing local and national policies cannot provide the necessary protection.

- 2.49 Policy DP19 (Transport) – this draft policy establishes that new development will be required to support the objectives of the West Sussex Local Transport Plan 2011 - 2026. The Plan's objectives include the provision of a high quality transport network that promotes a competitive and prosperous economy; and a network that affords access to services, employment and housing. In meeting these objectives, the draft policy permits development only where *inter alia*:

- it is sustainably located to minimise the need for travel;
- it facilitates and promotes the increased use of alternative means of transport to the private car, such as the provision of, and access to, safe and convenient routes for walking, cycling and public transport, and includes suitable facilities for secure and safe cycle parking;

- does not cause a severe cumulative impact in terms of road safety and increased traffic congestion; and
- provides appropriate mitigation to support new development on the local and Strategic Road Network.

- 2.50 *Focused Amendments to the District Plan* were published for consultation in November 2015, with the consultation period closing in January 2016.
- 2.51 The Focused Amendments include a number of modifications to the previous Draft District Plan particularly concerning housing provision over the plan period.
- 2.52 The Focused Amendments propose an increase in the planned housing requirement from 650 to 800 dwellings per annum (dpa) (13,600 dwellings over the plan period 2014 – 31). Modifications to policy DP5 (Housing), the supporting text and consequential amendments to other policies/paragraphs are therefore proposed to bring this increase in provision about.
- 2.53 The increase to the District’s requirement is above its calculated Objectively Assessed Housing Need (OAN) and has been proposed in order to better reflect and accommodate un-met housing needs arising in other local authority areas through the Duty to Co-operate. In order to secure the additional dwellings, the Focused Amendments also include a density policy and additional residential site allocations (including a strategic site for 600 new dwellings to the east of Pease Pottage).

- 2.54 The District’s future employment target has also been amended with alterations to draft policy DP2 (Sustainable Economic Development). The revised employment target is for 330 new jobs per annum over the plan period (5,610 net new jobs).

Northern West Sussex Economic Growth Assessment (EGA)

- 2.55 The *Northern West Sussex Economic Growth Assessment (EGA)* was prepared by consultants NLP for the Northern West Sussex local authorities (Crawley Borough, Horsham and Mid Sussex Districts). The Report was published in April 2014.
- 2.56 The purpose of the work was to define and consider the current position of the local economy and demand/supply considerations in respect of employment land; evaluate the options available for future growth including the testing of various scenarios; and provide recommendations as to the most appropriate option(s) setting out how the local authorities may best achieve economic growth.
- 2.57 The Report is focused on the employment space needs of the B Use Class sectors but also considered future projections for growth in non-B Class sectors (such as retail, leisure and healthcare) to show how the economy in each area could change in the future.
- 2.58 The EGA was predicated on an assumption that Gatwick Airport would develop to its maximum capacity of 45 million passengers per annum within its existing runway

capacity. The continued safeguarding of land for the future expansion of the Airport in Crawley was, however, identified and considered as a key economic constraint through the EGA work.

Functional Economic Relationships

- 2.59 Section 2 sets out the extent of the Northern West Sussex sub-region and Figure 2.1 identifies the context for the area. All of Mid Sussex and Burgess Hill are encompassed within the Northern West Sussex area which itself forms part of the wider Gatwick Diamond and is within the Coast to Capital LEP functional economic area.
- 2.60 Functional economic relationships are explored in paragraphs 2.15 onwards and shown in Figure 2.3, based on the 2001 Census. This highlights a broad geographic footprint for Northern West Sussex but also a clear concentration along the A23/M23 corridor and in the A27 coastal West Sussex area. Crawley is noted to attract significant daily commuting flows from both Horsham and Mid Sussex, but there is also an important reverse flow from Crawley to Mid Sussex as Figure 2.4 demonstrates. With updated travel to work data from the 2011 Census now available, the flows and patterns of commuting work travel are shown to reinforce the net out-commuting flow from Mid Sussex District to other centres in Northern West Sussex, to Brighton & Hove and to London.

Employment Floorspace Stock and Market Conditions

- 2.61 The EGA established that the current stock of B Use Class employment floorspace (Figure 2.6) totals 2,570,000 sq. m of which 24% was in Mid Sussex District based on 2008 Valuation Office Agency (VOA) data. The EGA's commentary noted in the 2000-2012 period that Mid Sussex and Horsham saw the largest gains (18% and 13% respectively) in industrial space (B1c and B2 uses) while Crawley recorded a reduction of 7%. Mid Sussex recorded a decline of 4% in its B1 office stock.
- 2.62 The state of the commercial property market was also set out in Section 2. Paragraphs 2.32 and 2.33 emphasise that the property market in Northern West Sussex is relatively insular and self-contained. Enquiries for business floorspace tend to originate from within the sub-region. Crawley is the notable exception, particularly at Manor Royal. Burgess Hill is also particularly identified as competing with other locations in the Gatwick Diamond and Coast to Capital LEP area for occupiers and investment.
- 2.63 The trends for commercial space in Northern West Sussex were identified as generally weak at paragraph 2.34, with the office market in particular being impacted by occupier uncertainty. However, the EGA reported that there has been a recent upturn in enquiries for office space. The industrial market was stated to be static through the downturn continuing to attract demand from a variety of sectors and for a range of premises sizes.
- 2.64 At paragraph 2.36 the EGA records that there is a market view that the sub-region is running out of floorspace to meet the requirements of local companies looking to

expand or relocate and also for new companies moving to the area. The harmful effect on the Northern West Sussex economy is identified, as jobs may be lost due to a lack of suitable employment space.

Gatwick Airport

- 2.65 In Section 3, the EGA Report identified the influence that Gatwick Airport has on both the office and industrial market in Crawley. The Report stated that there is some 23,000 sq. m of office accommodation within the Airport with about 4,000 sq. m of available floorspace (18% vacancy rate). The office space located on the Airport is restricted to aviation-related users and vacancy levels are noted in the EGA to arise from structural changes to international aviation business demands.

Mid Sussex District

- 2.66 Turning to Mid Sussex District in Section 5, the EGA confirmed that the proportion of B Use Class jobs in the District remained constant over the last 16 years at between 38% – 45% of all jobs in Mid Sussex.
- 2.67 Business services, health, education, retail and accommodation/food services were the principal economic sectors in the District. 20% of jobs were in the public sector with strong representation especially from health and education sectors.
- 2.68 The commuting trips analysis in paragraphs 5.23 – 5.24 and Figure 5.7 (based on 2001 Census) illustrate Mid Sussex as a location with a high rate of out-commuting.

Over 29,000 residents work elsewhere (mostly in Crawley) as well as in Brighton & Hove, Reigate & Banstead and Tandridge and Horsham. London accounts for some 25% of commuting trips from the District. Mid Sussex is described in the EGA as a net exporter of labour with a net outflow of some 16% of the resident workforce.

- 2.69 The current stock of employment floorspace at the time of writing of the EGA was 605,000 sq. m according to paragraph 5.25 with much of the supply formed of industrial (B1c and B2) and distribution and warehousing space (41% and 29% of the total stock respectively). The commercial office stock (B1) was stated at 181,000 sq. m, representing some 30% of all employment floorspace in the District.
- 2.70 The distribution of the District's office stock is primarily concentrated in Haywards Heath (31%), Burgess Hill (25%) and East Grinstead (24%) according to Figure 5.10.
- 2.71 The stock of industrial floorspace is noted to be concentrated around Burgess Hill (42%) and the A273 corridor.
- 2.72 Paragraph 5.30 identifies that 77% of all commercial office space was built before 1980 (50% before 1940) and is therefore relatively old. The proportions were considered to be significantly higher than the wider South East region (65% and 40% respectively). For industrial space, 70% is pre-1980, higher than the regional equivalent of 66%.
- 2.73 Mid Sussex vacancy levels were around 12% of total stock. Industrial floorspace vacancy was recorded as 8%

in Burgess Hill. These levels of vacancy are considered normal for the market (10% is usually considered a reasonable average vacancy level).

- 2.74 Levels of new B Use Class floorspace are outlined in Figure 5.12 and paragraph 5.36 of the EGA which show that across the 2002-2012 decade an average of just over 9,550 sq. m per annum was completed, reflecting losses of B Use Class space through re-development for other uses. Losses of B1a/b office space and B8 distribution and warehousing space were considered to be relatively modest with a variable pattern year on year.

Employment Sites Supply

- 2.75 The EGA reviewed the supply of existing employment sites and land in Section 6. Table 6.1 identifies a total of 31 sites in Mid Sussex representing 191.4 hectares of employment land.
- 2.76 Although not assessed in the EGA, the role of a new strategic employment site to the north and west of Burgess Hill was identified in the EGA at paragraph 6.105. An application for 15 hectares (50,000 sq. m) of B Use Class employment to the south of the A2300 known as 'The Hub' was also identified in the report (the site now has planning permission).

Future Economic Growth and Employment Floorspace Requirements

- 2.77 Section 7 of the EGA considered the future economic growth and employment floorspace requirements for Mid

Sussex District. It identified at paragraph 7.49 a need for 148,250 sq. m of employment floorspace under the Baseline job growth scenario to 2031; this equated to an estimated 30.7 hectares of additional employment land. Under the Higher Growth scenario, the requirement increased to 242,080 sq. m (52.8 Ha).

- 2.78 Existing, undeveloped, employment allocations, sites and outstanding planning permissions (excluding any allocations proposed in the Draft Plan such as land to the north and west of Burgess Hill) provided 29.9 hectares of employment land in the District but with a focus on industrial (B1c, B2 and B8 uses) accounting for 70% of that supply. Office and mixed B Use Class land represented the other 30% of potential existing undeveloped supply. Half of the space was noted to be concentrated in the Burgess Hill area.
- 2.79 On this basis, the EGA showed that under the Baseline economic growth scenario, Mid Sussex would have a slight shortfall of -0.8 hectares in available employment space.
- 2.80 In paragraph 8.42 the EGA noted that under the more aspirational Higher Growth economic growth scenario (resulting in a requirement for 52.8 hectares of new employment land 2011 - 2031), the shortfall of available floorspace would be some 10.4 hectares, necessitating the allocation of new employment land.
- 2.81 The need for a mix and choice of employment sites was identified and the EGA considered this for Mid Sussex in

paragraphs 8.43 – 8.45, concluding that there would be a shortfall of office space of circa 2.9 hectares.

- 2.82 Qualitative factors were then considered and the EGA highlighted the relatively old and limited new development of office stock in Mid Sussex resulting in a shortage of top quality, Grade A space. The EGA noted that a lack of readily available land for new office and industrial development was beginning to divert enquiries outside of the District, as requirements cannot be met. The EGA concluded in paragraph 8.51 that without intervention there was a risk that the ability of Mid Sussex to accommodate indigenous expansion and new inward investment will become increasingly undermined.

Burgess Hill Employment Sites Study

- 2.83 The *Burgess Hill Employment Sites Study* (March 2015) was prepared by consultants CCL for the Council.
- 2.84 The aim of the commission was to review, update and evaluate evidence to support the proposed strategic allocation of up to 30 hectares of B Use Class employment land at Burgess Hill along the A2300 strategic transport corridor.
- 2.85 The overall conclusions of the report, based on the analysis and evidence evaluated, demonstrated that the proposed strategic employment allocation was necessary in order to help meet employment land and commercial market demands in in Mid Sussex District and support neighbouring authorities with potential unmet employment land needs. The report's conclusions are

that the proposed 30 hectare allocation to the west of Burgess Hill is suitable, available and achievable.

- 2.86 In Section 3, the report provided an assessment of employment land demand for Mid Sussex covering the period 2014 – 2031. The assessment updated the economic demand assessment set out in the earlier *Economic Growth Assessment* report and concluded:

- Mid Sussex had seen a steady economic recovery since the recession. Forecasts are for an economic growth rate of 2.1% per annum between 2011 and 2031 (Experian, December 2014). This compared with a forecast economic growth rate of 2.35% per annum for West Sussex for the same period.
- Employment growth in Mid Sussex between 2001 and 2011 was slightly above the West Sussex and South East average according to the ONS. However, economic forecasters indicate a reduction in employment in this period for Mid Sussex.
- Employment growth reflected an increased level of part-time and contract-hour working in certain sectors in Mid Sussex, resulting in an overall reduction in employment on a full-time equivalent (FTE) basis.
- The economic forecasts for Mid Sussex from Experian (December 2014) showed a different pattern of growth by industry sector compared with the earlier, May 2013 Experian forecasts. This resulted in a slight reduction in the forecast number of total jobs between 2011 and 2031 (from, 10,425 in the May

2013 Experian forecasts to 9,563 in the December 2014 Experian forecasts, both on a workforce-basis). The forecasts for the period 2014-31 were for an increase of 4,790 jobs (FTE basis) (annualised to 282 jobs per year).

- The B Use Class employment forecasts translated into a potential gross land demand requirement of 19.5 hectares under a Baseline Assessment (Table 3.9) split as 19.1 Ha for B1c, B2 and B8 Use Classes and 0.4 Ha for B1a/b office uses.
- Sensitivity analysis was applied that indicated a potential range of 15.7 to 31 hectares across the period 2014-31 (as set out in Table 3.10 of the report).
- An alternative set of economic forecasts was obtained from Oxford Economics. This suggested a lower absolute level of total employment growth in Mid Sussex between 2014 and 2031 compared with the Experian forecasts (using a workforce-based definition).
- The Oxford Economics forecasts suggested a higher level of B Use Class employment growth (workforce-based) than the Experian forecasts. When translated into a potential land demand requirement, this equated to approximately 35 hectares.
- An assessment of the potential impacts of Gatwick Airport on employment land demand in Mid Sussex was carried out. Under a 'No Second Runway'

scenario, this could lead to an additional requirement for 4.7 hectares of land.

- 2.87 The overall conclusion from the assessment set out in the report was that there was a realistic economic demand requirement for approximately 25-30 hectares of additional employment land in Mid Sussex between 2014-31.

Mid Sussex District Housing and Economic Growth Needs Assessment (HEDNA) Update

- 2.88 The District Council has prepared two *Housing and Economic Development Needs Assessment* (HEDNA) reports. The first was published in March 2015 and the most recent, updated version in November 2015.
- 2.89 The purpose of the HEDNA was to set out the methods and calculations of the District's housing and economic development needs to establish the Objectively Assessed Need (OAN).
- 2.90 The HEDNA report advises that it was prepared using the latest available information in accordance with the NPPG (section 2a, paragraph 016).
- 2.91 Much of the focus of the HEDNA is concerned with establishing the need for housing but the report does also examine the economic development needs arising from housing growth.
- 2.92 Section 7 is concerned with economic development needs and updates the forecasts of quantitative need. It confirms at paragraph 7.10 that the Burgess Hill

Employment Sites Study offers the most recent information on the need for employment development in Mid Sussex. It highlights in paragraph 7.12 that the latest forecasts for the 2014-31 period are for an increase of 4,790 jobs (FTE basis) and that this equates to 282 new jobs per annum.

- 2.93 The HEDNA concludes in paragraph 7.17 that the number of new jobs proposed in Burgess Hill and other likely employment allocations and developments in the District would be greater than the resident workforce jobs based on a housing OAN of 695 dwellings per annum (dpa). With the Draft District Plan's proposed planned housing requirement of 800 dpa (to include support for unmet needs arising outside of Mid Sussex), the HEDNA

concludes that job creation would be broadly aligned with the additional resident workforce jobs that would be generated for housing options up to 800 dpa. It indicates that housing provision higher than this would likely require further allocation of employment land. It does not, however quantify any further employment land need that would arise in such a situation.

3. APPROACH AND METHOD

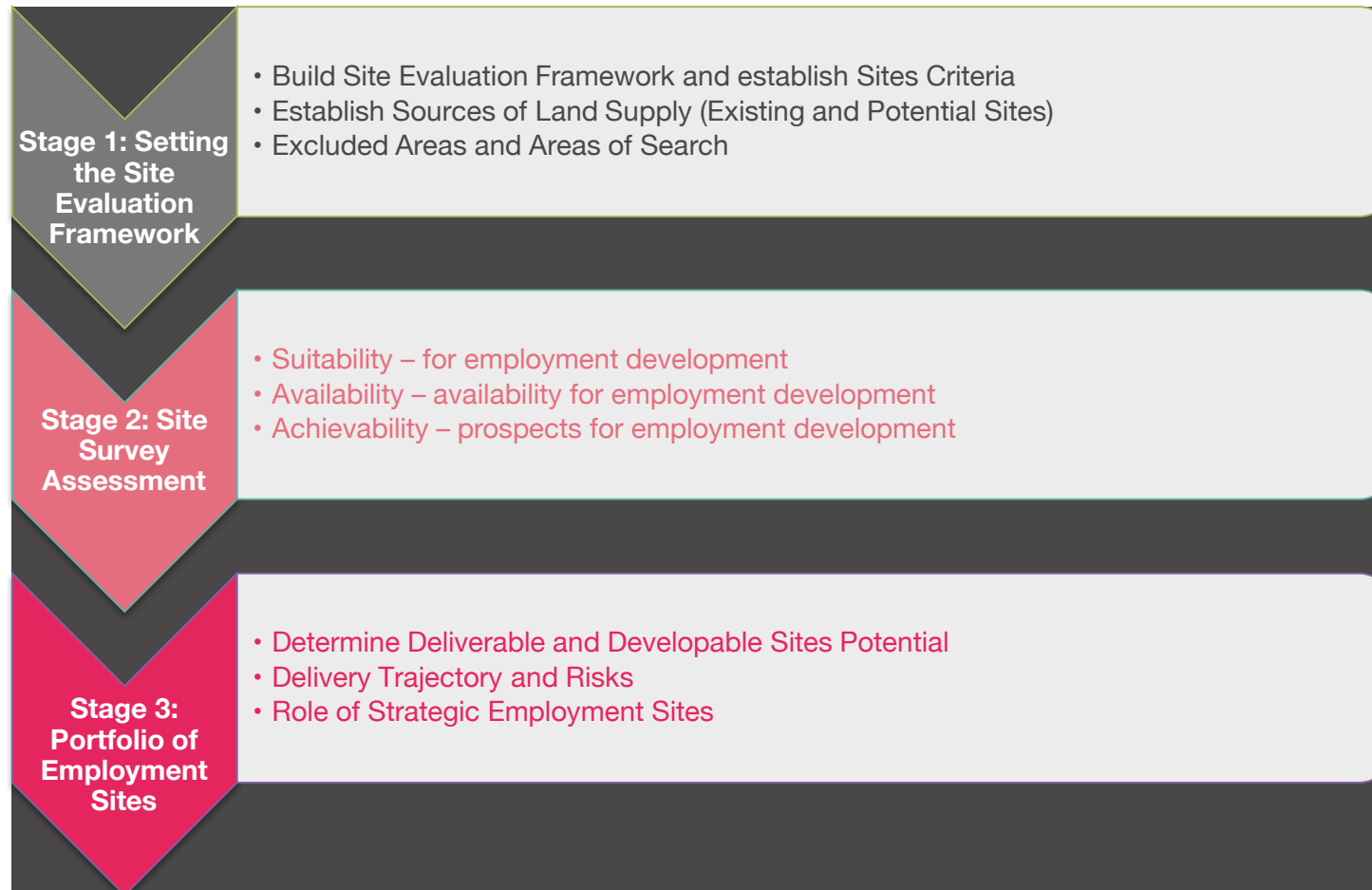
Introduction

- 3.1 This section outlines the approach and method used to prepare an objective and practical assessment of employment land sites and floorspace for Mid Sussex District.
- 3.2 The assessment work is focused on land supply for B-class employment floorspace covering the following categories:
- **B1 Business** (offices, research & development, light industry);
 - **B2 General Industrial**; and
 - **B8 Storage or Distribution** (wholesale warehouses, distribution centres).
- 3.3 In accordance with the requirements of the National Planning Policy Framework and the National Planning Practice Guidance, and on the basis that Mid Sussex District Council has already invested in a significant body of economic and employment analysis and reports over the period of the Draft Plan's preparation, and prior to that, this Report makes best use of available information as far as possible and as appropriate. Data sources and the use

of existing information are identified in each of the relevant sections of the report.

- 3.4 The analysis has been undertaken through a combination of desk-based and site survey work using published and available information, and the overall process is shown in Figure 3.1 below.
- 3.5 The methodology comprised linked stages of work described in detail in the following sections.

Figure 3.1: SELAA Site Assessment Process – Overview



Source: CCL, 2016

Stage 1: The Site Evaluation Framework

Site Assessment Evaluation Framework

- 3.6 The role of the SELAA is to ensure that the Council has a robust understanding of the amount and nature of land with potential for economic development within the B Use Classes.
- 3.7 A central component of the SELAA work has been the development of an objective Site Assessment Evaluation Framework for the analysis of employment land and floorspace supply. The complete Framework of surveyed sites is included at **Appendix 2**.
- 3.8 The details of the Site Assessment Evaluation Framework include a focus on creating a balanced approach that appraises a range of key indicators and characteristics in a transparent and objective way. The framework is consistent with existing assessment criteria in the current *National Planning Practice Guidance* (particularly Section 3).
- 3.9 The Framework has enabled existing and potential sites and floorspace to be evaluated in a structured and logical manner, allowing a 'priority categorisation' of employment sites to be prepared. The purpose of this is to ensure that there is a clear and consistent logic to the assessment of each existing or potential site.
- 3.10 The Framework uses an objective grading and ranking approach for most of the site indicators. This combines

quantitative scoring within defined ranges for individual indicators together with qualitative commentary where appropriate. A full description of each of the ranges and scoring indicators is set out in **Appendix 1**.

Establishing Sources of Supply

- 3.11 There are various sources of information to assist in identifying existing and potential employment land and floorspace supply. A basic site size of 0.25 Ha and 500 sq. m has been applied in accordance with the NPPG.
- 3.12 The potential sources of employment land/floorspace sites supply are drawn from the following sources:
- Existing and emerging District Plan and Neighbourhood Plans;
 - Northern West Sussex Economic Growth Assessment, 2014;
 - MSDC Call for Sites process, August 2015;
 - Draft District Plan proposed allocations for employment land (including those contained in larger mixed-use allocations);
 - MSDC Planning Register (including refused/withdrawn applications for employment development) and District Monitoring Reports;
 - Review of the MSDC Strategic Housing Land Availability Assessment (SHLAA) to identify potential sites that, while not concluded to be appropriate for

residential development, may be acceptable for employment use;

- Review of Ordnance Survey and aerial imagery;
- Housing and Economic Development Needs Assessment (HEDNA), February 2015;
- Burgess Hill Employment Sites Study, March 2015; and
- West Sussex County Council Commercial and Industrial Development Survey, 2015.

3.13 There are a number of sources of information that assist in identifying and assessing employment land sites in the District. These include:

- the Commercial and Industrial Development Survey 2015. Identifies existing planning permissions data, and is produced by West Sussex County Council;
- the Call for Sites exercise undertaken by Mid Sussex District Council during 2015;
- potential employment site details, held by Mid Sussex District Council;
- the Northern West Sussex Economic Growth Assessment (EGA) of 2014. The Employment Land Review undertaken as part of this study identified 31 employment sites within Mid Sussex, with details incorporated into the assessment of sites schedule supporting the SELAA;

- Burgess Hill Strategic Employment Land Study (March 2015) which included analysis of employment land and sites in and around Burgess Hill. Further work to support the identification of land for a new Science and Technology Park near Burgess Hill also included locational analysis and critical review of potential, alternative locations in a wide area around Burgess Hill, Bolney, Hurstpierpoint, Hassocks, Sayers Common and Albourne. These studies have identified additional potential employment sites within Mid Sussex.

Excluded Sites and Areas of Search

3.14 An initial desktop review was undertaken to exclude those sites that should automatically be excluded from the assessment. Where constraints exist on part of the site, the remainder was considered in the SELAA.

3.15 Sites were excluded from assessment if they were:

- less than 0.25 hectares or 500 sq.m of employment development floorspace – the exclusion of these sites and floorspace is in accordance with the levels set in the NPPG;
- not within or adjoining to an identified settlement or previously developed land (PDL). Only sites within or nearby to an ‘identified’ settlement in accordance with the District settlement hierarchy (set out in the the District Plan Key Diagram and in policy DP6) or a PDL site were considered as part of the assessment;

- sites in the District but which fall within the South Downs National Park (SDNP) as this area lies outside the boundaries for the Mid Sussex District Plan;
- within the High Weald Area of Outstanding Natural Beauty (AoNB). This area forms a large part of the District. It is a national level protected area within which development is restricted. The SELAA has excluded sites within this area that are not existing employment sites or previously developed land;
- within function flood plains (flood zones 3a and 3b) - land that is in functional flood plains was not included in the SELAA;
- Sites of Special Scientific Interest – these are important, statutorily protected areas used for recreational, amenity and educational/scientific purposes and were excluded from the SELAA;
- within Special Areas of Conservation – these areas are protected sites designated under the European Commission Habitats Directive;
- within Special Protection Area – these areas are protected sites designated through the European Commission Birds Directive;
- Scheduled Ancient Monuments and Ancient Woodlands – these sites are identified as historic assets of heritage value and are protected in law and through national planning policy;
- designated Local Green Spaces – the NPPF sets out that such sites should be ruled out for new

development other than in very special circumstances.

- 3.16 There are evident primary constraints to development capacity to the north and south of Burgess Hill in Mid Sussex District as identified in Figure 4 of the *Mid Sussex District Plan: Pre-Submission Draft* (June 2015) and Figures 2.3 and 3.2 of the *Capacity of Mid Sussex to Accommodate Development Study* (June 2014) prepared for the District Council by Land Use Consultants. This Study represents recently prepared evidence underpinning the emerging District Plan and which takes into account current statutory landscape, environmental and development designations as well as providing a synthesis assessment of areas of development capacity. It identifies the South Downs National Park and the High Weald Area of Outstanding Natural Beauty as primary constraints to development.
- 3.17 The National Park runs in an east-west direction with its northern border near Albourne and stretches southwards to the development boundary of Brighton & Hove City. The Area of Outstanding Natural Beauty stretches east-west running northwards from Bolney and encompassing land to the boundaries of Crawley and north of Haywards Heath. The SDNP area has therefore been excluded from the SELAA and possible sites in the AoNB restricted as noted previously.
- 3.18 The *Capacity of Mid Sussex to Accommodate Development Study* has therefore been used to focus and guide broad locations, and areas for inclusion and exclusion for the SELAA.

- 3.19 The **Site Assessment Evaluation Framework** was applied to the assessment of existing commercial B Use Class land and floorspace, relevant brownfield and greenfield land promoted through the District's Commercial Call for Sites exercise, and other sources of potential supply.
- 3.20 The assessment of existing and potential sites has been undertaken based on structured Site Assessment Proformas for each site.
- 3.21 Each site survey proforma contained information to guide the site survey approach and inform the issues that need to be tested and checked on site. This has ensured that site surveys have a robust foundation and that centrally collected data reflects current local conditions.
- 3.22 The Site assessment survey data was collated from the completed proformas into an Excel spreadsheet with a unique reference number allocated for each site assessed.

Stage 2: Conducting the Site Survey Assessment

Assessment Indicators and Measures

- 3.23 The criteria used to assess the employment sites draws from the NPPG at Section 3, and particularly paragraph 016, that sets out a series of assessment criteria for

potential employment sites/locations, namely factors such as:

- site size, boundaries and location;
- current land use and character of the surrounding area;
- physical constraints (access, contamination, steep slopes, flooding, natural features of significance, location of infrastructure/utilities);
- potential environmental constraints;
- where relevant, development progress (ground works completed, number of units started, number completed, etc.); and
- initial assessment of whether the site is suitable for a particular type of use or as part of a mixed-use development.

- 3.24 Sites or parts of sites which do not meet the exclusion criteria set out above and were not therefore automatically discounted from the SELAA assessment were taken through to the appraisal of 'suitability' 'availability' and 'achievability' undertaken through a combination of desktop and primary (site survey) work.

A: Suitability

Locational Factors

- 3.25 Sustainable development locations are established through the District Plan and informed by appropriate

evidence base information, not least the plan's Sustainability Appraisal and work such as the *Capacity of Mid Sussex to Accommodate Development Study*. It is not therefore the purpose or role of the SELAA to identify what locations may be sustainable for future development or land uses. It is however essential that the SELAA takes a practical and objective view to ensure that locations which are more likely to be sustainable for employment land uses are considered through the SELAA. It is for the District Plan to define the spatial strategy and where land use allocations will occur.

- 3.26 Sites located within or in close proximity to an existing, identified settlement (in accordance with the District's hierarchy) were considered through the SELAA process.
- 3.27 The locational status of the site in terms of whether it was a brownfield (previously developed land) or greenfield location was recorded. Previously developed land both within and outside settlements was included.

Physical Attributes

- 3.28 Physical constraints to employment land development relate to general matters that may present a permanent constraint to development and prevent a site or floorspace from being 'suitable' or constrained in the type or level of B Use Class activity that could occur. Such factors include:
- Building age;
 - Building quality;

- Surrounding land uses;
- Topography (land slope/gradient); and
- Site shape.

Environmental Factors

- 3.29 Understanding the environment is a critical factor in assessing the potential for employment land sites and is an important component in determining site 'suitability'.
- 3.30 Assessment of environmental factors for sites and floorspace in the SELAA was undertaken by reference to the composite environmental, infrastructure agricultural land classification and landscape evidence base set out in the *Capacity of Mid Sussex to Accommodate Development Study*.
- 3.31 Where necessary, site-level environmental constraints were further reviewed and checked through both desk-top information provided from DEFRA, the Environment Agency, English Heritage and Natural England as well as through the on-site surveys.

Utilities and Infrastructure

- 3.32 Through desk-top assessment, an analysis of the extent to which utilities infrastructure cover a site and their potential impact were considered. The following were included within the consideration of infrastructure constraints:
- high pressure gas pipelines;
 - national grid transmission lines; and

- immovable communication links.

B: Availability

- 3.33 Sites were examined in relation to whether they are 'available' for development. Availability (and 'Achievability') of sites is effectively a consideration of the viability and deliverability of sites, and therefore whether they are realistic and credible opportunities for delivery during the plan period.
- 3.34 The critical elements for establishing availability in the SELAA were:
- **Planning site constraints;**
 - **Access constraints;**
 - **Servicing and parking constraints.**
- 3.35 Existing sites and those with extant planning permissions, or allocated in either the District Plan or relevant Neighbourhood Plan, were automatically considered to be available and were re-surveyed and reviewed as part of the SELAA process.

Planning Site Constraints

- 3.36 Land use constraints are effectively focused on planning policy and related designations that preclude or support certain forms of development activity. Such constraints include:
- **Listed Buildings;**
 - **Conservation Areas; and**

- **Scheduled Ancient Monuments.**

Access

- 3.37 Sites for new employment development were considered in relation to their levels of accessibility and proximity to strategic transport infrastructure (motorway and A-roads, and to existing rail links). Sites were also considered in relation to their location and ability to access essential, supporting services and facilities that are beneficial for employees.

C: Achievability

- 3.38 Achievability assessment was only undertaken for those sites that were deemed to be both 'suitable' and 'available'.
- 3.39 A site was considered to be achievable for development where there is a reasonable prospect that it will be developed at a particular time during the plan period. This is effectively a professional judgment about the viability and market demand of a site including:
- **Market factors – including:**
 - **opportunities for expansion of existing sites and floorspace;**
 - **visibility and prominence of sites and floorspace;**
 - **Critical mass - proximity to other compatible employment uses (clusters);**

- Delivery factors – phasing and realistic possible build-out rates within the plan period.

Stage 3: Drawing Conclusions on the Portfolio of Employment Sites

- 3.40 A portfolio of employment sites and land is necessary in order to support the objectives and policies of the District Plan. The portfolio of employment land needs to ensure that there is a choice and mix of sites for different B Use Class activities in various locations across the District and to offer both urban and more rural (small settlements) sites to support economic growth.
- 3.41 From the Site Survey Assessment of existing and potential employment sites, an appraisal of ‘deliverability’ and ‘developability’ can be determined. This is important in helping to establish the supply of employment land and to identify the trajectory of delivery over the plan period, and especially in the first five years:
- **Deliverable sites (1-5 years)** - in order to establish deliverable sites (within the five-year period) for the development trajectory, sites should be immediately available, offer a suitable location for development now and be found to be achievable with a realistic prospect of their development.

- **Developable sites (6+ years)** - sites that are suitable, available and achievable but where it cannot be established that they are deliverable now (within the five-year period) are identified for inclusion later in the plan period and are considered to be ‘developable’ employment sites. Such sites may have a higher level of uncertainty or risk to their eventual delivery.

- 3.42 In addition, in order to ensure that a portfolio of employment land is identified and maintained, a series of more strategic employment sites were also identified. These are the sites that form the most critical parts of the existing and potential employment land supply. Sites may be considered as ‘strategic’ because of their:

- size and scale – their ability to accommodate large amounts of B Use Class employment floorspace;
- clustering in relation to other existing employment land sites and floorspace;
- their location in juxtaposition to other employment sites, highly accessible locations, urban centres or major new residential development locations;
- their existing or potential role in supporting and enhancing particular economic sectors locally or at a wider sub-regional/regional level.

4. EMPLOYMENT LAND SUPPLY

Introduction

- 4.1 This section provides an overarching analysis of the employment land and sites assessment for the District. It is based on the identification and assessment of existing and potential employment land using the methodology described previously in Section 3.
- 4.2 Headline findings are set out here and these draw on the individual assessment of more than 140 existing and possible employment sites in the District. **Appendix 2** contains the results of individual site analyses and the conclusions and recommendations drawn for each.
- 4.3 This section considers the existing employment land supply (i.e. sites and floorspace that already perform a B Use Class role and function). It also examines the possible future employment land supply looking at both the expansion of existing sites but also the potential for new land to form part of the employment land supply.
- 4.4 Strategic or key employment sites are considered with analysis of the employment land portfolio to identify the

more important sites that comprise the existing and potential future employment land supply.

- 4.5 Finally, this section provides an overarching analysis of the possible development trajectory and possible numbers of jobs that the land supply could support. Key risks/barriers to delivery of future employment land supply are also considered. Again, these analyses are founded on the survey assessment of individual sites.

Overview of Employment Land Supply

- 4.6 Collation of the various sources of employment land supply was undertaken and resulted in a total of 140 sites and areas being identified across the District.
- 4.7 Following an initial process of excluding 23 sites or areas that fell outside eligibility criteria (as set out in Section 3 previously), a total of **118** individual sites were identified and subject to survey and detailed assessment.
- 4.8 Table 4.1 below provides a summary of the headline results from the supply assessment covering existing, committed and proposed allocation sites. The site survey and desk analysis work identified approximately 253.3 hectares of existing, committed or allocated employment land in Mid Sussex. Of this total, approximately 37 hectares is vacant¹.

¹ The total figures in Table 4.1 refer to the total site area of each site. The vacant figure for existing sites relates to areas that are not in obvious

operational use. Vacant figures for committed, proposed allocations and potential sites relates to the area that is potentially available for development.

- 4.9 The main locations of existing employment land supply are Burgess Hill, East Grinstead and Worth. These locations constitute approximately 66% of the existing employment land supply in Mid Sussex.

Table 4.1: Summary of Total Employment Land (Existing, Committed and Proposed Allocations) in Mid Sussex (Hectares)

	Committed		Existing		Proposed Allocation	
	Total	Vacant	Total	Vacant	Total	Vacant
Albourne	0.0	0.0	2.1	0.3	0.0	0.0
Ashurst Wood	0.0	0.0	1.1	0.0	0.0	0.0
Balcombe	0.0	0.0	0.5	0.3	0.0	0.0
Bolney	0.0	0.0	11.5	0.3	0.0	0.0
Burgess Hill	0.0	0.0	84.2	3.0	0.0	0.0
Copthorne and Worth	0.0	0.0	0.0	0.0	0.0	0.0
Crawley Down	0.0	0.0	0.0	0.0	0.0	0.0
Cuckfield	0.0	0.0	0.0	0.0	0.0	0.0
East Grinstead	0.0	0.0	33.2	0.0	0.0	0.0
Hassocks	0.0	0.0	1.4	0.1	0.0	0.0
Haywards Heath	0.0	0.0	21.8	0.0	0.0	0.0
Horsted Keynes	0.0	0.0	4.3	0.0	0.0	0.0
Hurstpierpoint and Sayers Common	16.6	15.6	16.9	1.6	14.4	14.4
Lindfield	0.0	0.0	0.4	0.0	0.0	0.0
Lindfield Rural	0.0	0.0	0.0	0.0	0.0	0.0
Slaugham	0.0	0.0	10.1	0.0	0.0	0.0
Twineham	0.0	0.0	1.4	0.4	0.0	0.0
West Hoathly	0.0	0.0	3.1	1.0	0.0	0.0
Worth	0.0	0.0	30.4	0.0	0.0	0.0
TOTAL	16.6	15.6	222.3	7.1	14.4	14.4

Existing Employment Land Supply

Existing Employment Land by Use Class

- 4.10 Of the existing employment land in Mid Sussex, Table 4.2 identifies that approximately 42 hectares (18.9%) is in B1a/b Use Class. Approximately 12 hectares (5.3%) is in B1c Use Class, 13 hectares (5.8%) in B2 Use Class, and 12 hectares (5.6%) in B8 Use Class.
- 4.11 Some 93 hectares (41.6%) of existing employment land is in Mixed B Use Classes (i.e. more than one B use activity). A further 50 hectares (22.3%) is in other commercial uses or in non-commercial use.

Existing Employment Land by Broad Location

- 4.12 The main locations of B1a/b (offices) Use Class are:
- East Grinstead (11 hectares);
 - Haywards Heath (13.3 hectares);
 - Hurstpierpoint and Sayers Common (5.1 hectares); and
 - Slaugham (5 hectares).
- 4.13 The principal B1c and B2 Use Class (light and general industry) locations are:
- Bolney (7.7 hectares);
 - East Grinstead (5.8 hectares);

- West Hoathly (3.1 hectares); and
- Worth (3.7 hectares).

- 4.14 The main B8 Use Class (storage and distribution) locations are:
- Burgess Hill (1.6 hectares);
 - Hurstpierpoint and Sayers Common (4.9 hectares); and
 - Worth (4 hectares).
- 4.15 The main locations of Mixed B Use Class activity are Burgess Hill (63.5 hectares) and Worth (13.5 hectares).

Table 4.2: Breakdown of Existing Employment Land in Mid Sussex by B Use Class Status (Hectares)

	B1a/b	B1c	B2	B8	Mixed B Use	Other Commercial Mix	Non Commercial Use	Total (Ha)
Albourne	1.0	0.0	0.0	0.7	0.4	0.0	0.0	2.1
Ashurst Wood	0.0	0.0	0.6	0.0	0.0	0.6	0.0	1.1
Balcombe	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.5
Bolney	0.0	5.8	1.9	0.0	1.3	2.5	0.0	11.5
Burgess Hill	1.6	0.0	1.0	1.6	63.5	15.4	1.1	84.2
Copthorne and Worth	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Crawley Down	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Cuckfield	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
East Grinstead	11.0	4.6	1.2	0.0	7.4	9.0	0.0	33.2
Hassocks	0.0	0.0	0.0	0.0	0.0	1.4	0.0	1.4
Haywards Heath	13.3	0.7	0.7	0.7	3.4	3.1	0.0	21.8
Horsted Keynes	2.6	0.0	0.3	0.0	0.0	1.4	0.0	4.3
Hurstpierpoint and Sayers Common	5.1	0.0	1.3	4.9	2.2	3.4	0.0	16.9
Lindfield	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4
Lindfield Rural	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Slaugham	5.0	0.0	0.0	0.0	0.0	5.1	0.0	10.1
Twineham	0.1	0.0	0.0	0.6	0.0	0.7	0.0	1.4
West Hoathly	0.0	0.0	3.1	0.0	0.0	0.0	0.0	3.1
Worth	2.2	0.9	2.8	4.0	13.5	7.1	0.0	30.4
TOTAL (Ha)	41.8	11.9	12.8	12.4	92.7	49.6	1.1	222.3*

* - Excludes proposed allocations and commitments

Existing Employment Land by Site and Floorspace Size

- 4.16 Table 4.3 provides a breakdown of existing employment floorspace in Mid Sussex by broad size band in each location.
- 4.17 These range from sites of less than 2,500 sq.m to those over 50,000 sq.m. Analysis of the data shows that the largest grouping of sites, in terms of number of sites, is in the 0 to 2,499 sq.m category, with approximately 35% of existing employment sites falling into this category.
- 4.18 There are also a significant number of sites of circa 10,000 sq.m floorspace. Approximately 33% of existing employment sites are larger than 10,000 sq.m. There is a particular concentration of this size of employment floorspace found in East Grinstead and in Burgess Hill which are two of the main employment centres in the District.

Table 4.3: Breakdown of Existing Employment Land in Mid Sussex by Size Band (Number of Sites)

Sq.m	0-2,499	2,500 - 5,000	5,001- 7,500	7,501- 10,000	10,001 - 25,000	25,001- 50,000	50,000+	Total
Albourne	2	1	0	0	0	0	0	3
Ashurst Wood	1	0	0	0	0	0	0	1
Balcombe	1	0	0	0	0	0	0	1
Bolney	0	1	0	0	1	0	0	2
Burgess Hill	1	0	0	0	1	1	3	6
Copthorne and Worth	0	0	0	0	0	0	0	0
Crawley Down	0	0	0	0	0	0	0	0
Cuckfield	0	0	0	0	0	0	0	0
East Grinstead	2	1	3	0	5	1	0	12
Hassocks	1	0	0	0	0	0	0	1
Haywards Heath	1	0	1	0	0	3	0	5
Horsted Keynes	1	0	2	0	0	0	0	3
Hurstpierpoint and Sayers Common	0	2	1	0	2	0	0	5
Lindfield	0	1	0	0	0	0	0	1
Lindfield Rural	0	0	0	0	0	0	0	0
Slaugham	3	0	0	0	0	0	0	3
Twineham	0	1	0	0	0	0	0	1
West Hoathly	0	0	0	0	0	1	0	1
Worth	6	1	2	0	0	0	0	9
TOTAL	19	8	9	0	9	6	3	54

(NB: Site 26: Residential/Mixed Use Area in Victoria Business Park East is not included in the total as there is no separate floorspace breakdown for this site)

- 4.19 Table 4.4 provides a breakdown of existing employment floorspace in Mid Sussex District by size, as measured in hectares, ranging from sites of under 1 hectare to those above 20 hectares.
- 4.20 The majority of sites are less than 2.5 hectares, equating to approximately 60% of all existing employment sites. East Grinstead, Worth, and Albourne have the largest number of sites in these categories.

Table 4.4: Breakdown of Existing Employment Land in Mid Sussex by Size Band (Number of Sites)

Hectare Range	0-1	1.1-2.49	2.5-4.9	5-9.9	10-19.9	20+	Total
Albourne	3	0	0	0	0	0	3
Ashurst Wood	0	1	0	0	0	0	1
Balcombe	1	0	0	0	0	0	1
Bolney	0	1	0	1	0	0	2
Burgess Hill	0	1	1	2	2	1	7
Copthorne and Worth	0	0	0	0	0	0	0
Crawley Down	0	0	0	0	0	0	0
Cuckfield	0	0	0	0	0	0	0
East Grinstead	5	4	1	1	1	0	12
Hassocks	0	1	0	0	0	0	1
Haywards Heath	2	0	1	1	1	0	5
Horsted Keynes	2	0	1	0	0	0	3
Hurstpierpoint and Sayers Common	1	2	1	1	0	0	5
Lindfield	1	0	0	0	0	0	1
Lindfield Rural	0	0	0	0	0	0	0
Slaugham	1	0	1	1	0	0	3
Twineham	0	1	0	0	0	0	1
West Hoathly	0	0	1	0	0	0	1
Worth	4	2	1	1	1	0	9
TOTAL	20	13	8	8	5	1	55

Existing Supply by Age and Quality of Stock

- 4.21 Table 4.5 illustrates how the overall quality of sites (as measured by age of building and building quality) varies by size category.
- 4.22 In terms of quality by number of employment sites, approximately 35% of the sites surveyed were rated as 'good' and a further 57% are rated as 'average'.
- 4.23 Only 7% of sites were rated as 'poor'. In broad terms, the larger sites tend to have fewer 'poor' ratings.

Table 4.5: Breakdown of Existing Employment Land in Mid Sussex by Composite Quality (Number of Sites)

Hectare Range	Good	Average	Poor	Total
0-1	6	12	1	19
1.1-2.49	4	6	3	14
2.5-4.9	1	7	0	8
5-9.9	3	5	0	7
10-19.9	4	1	0	4
20+	1	0	0	2
TOTAL	19	31	4	54

Table 4.6: Breakdown of Existing Employment Land in Mid Sussex by Composite Building Quality (Hectares by Quality)

Hectare Range	Good	Average	Poor	Total
Albourne	1.4	0.7	0.0	2.1
Ashurst Wood	0.0	0.0	1.1	1.1
Balcombe	0.0	0.0	0.5	0.5
Bolney	0.0	11.5	0.0	11.5
Burgess Hill	68.9	15.3	0.0	84.2
Copthorne and Worth	0.0	0.0	0.0	0.0
Crawley Down	0.0	0.0	0.0	0.0
Cuckfield	0.0	0.0	0.0	0.0
East Grinstead	18.3	14.9	0.0	33.2
Hassocks	0.0	0.0	1.4	1.4
Haywards Heath	12.5	9.3	0.0	21.8
Horsted Keynes	0.0	4.2	0.0	4.2
Hurstpierpoint and Sayers Common	9.8	7.1	0.0	16.9
Lindfield	0.4	0.0	0.0	0.4
Lindfield Rural	0.0	0.0	0.0	0.0
Slaugham	4.0	6.1	0.0	10.1
Twineham	1.4	0.0	0.0	1.4
West Hoathly	0.0	3.1	0.0	3.1
Worth	17.1	11.9	1.3	30.4
TOTAL	133.7	84.2	4.3	222.3

- 4.24 Table 4.6 above provides further detail on the composite quality of sites. This shows the total hectares in each location by quality grade.

4.25 From this table it can be seen that approximately 134 hectares (60%) of existing employment land area is rated as 'good', and a further 84 hectares (38%) is rated as 'average'. Only 2% of land area in existing employment sites is rated as 'poor'.

Existing Supply by Development Potential Status

4.26 The potential for existing employment sites to form part of the employment land supply in future is considered in Table 4.7 below. **Appendix 2** sets out the analysis and conclusions relevant to each existing site while **Appendix 3** provides individual site maps.

4.27 Of the existing employment land in Mid Sussex, approximately 153 hectares is recommended to remain protected for B Use Class employment.

4.28 Approximately 24 hectares could potentially be released for other uses, which constitutes approximately 11% of the existing employment land supply. A relatively small element (0.4 hectares) is identified as 'developable within the next 6-11 years'.

4.29 The main locations for potential release of existing employment land include Burgess Hill (17.2 hectares) and East Grinstead (6.9 hectares). The sites are:

- **Former Sewage Treatment Works, Fairbridge Way (Site 20):** 12.1 Ha – the site has permission for re-

development for 325 residential dwellings and associated community infrastructure.

- **Residential/Mixed Use Area, Victoria Business Park East (Site 26):** 5.15 Ha – the site, within the existing Victoria Business Park, is identified and allocated in the Burgess Hill Neighbourhood Plan for residential development.
- **Charlwoods Industrial Estate (Site 47):** 5.8 Ha – the Neighbourhood Plan for the area identifies the Estate for a mixed use re-development including residential development. The designation includes opportunities for smaller B1 office uses (up to 300 sq.m) as part of future residential-led development.
- **Railway Approach, East Grinstead (Site 51):** 0.4 Ha – the emerging Neighbourhood Plan identifies the site as suitable for allocation as a mixed-use site primarily for A Use Class (retail) activities together with residential development.
- **Cantelupe Road, East Grinstead (Site 52):** 0.75 Ha – release given high levels of vacancy and recent conversion of some individual office blocks to residential. The remaining office stock is dated with poor access, servicing and parking. Release is a reflection of the current and future lawful changes of use on the site in the context of the quality and nature of the stock available.

Table 4.7: Breakdown of Existing Employment Land in Mid Sussex by Development Status (Hectares)

	Not Developable	Existing - Protect	Existing - Protect and expand	Existing - Release	Total (Ha)
Albourne	0.0	2.1	0.0	0.0	2.1
Ashurst Wood	0.0	1.1	0.0	0.0	1.1
Balcombe	0.0	0.0	0.5	0.0	0.5
Bolney	0.0	0.0	11.5	0.0	11.5
Burgess Hill	0.0	66.9	0.0	17.3	84.2
Copthorne and Worth	0.0	0.0	0.0	0.0	0.0
Crawley Down	0.0	0.0	0.0	0.0	0.0
Cuckfield	0.0	0.0	0.0	0.0	0.0
East Grinstead	0.0	26.2	0.0	7.0	33.2
Hassocks	0.0	0.0	1.4	0.0	1.4
Haywards Heath	0.0	21.0	0.8	0.0	21.8
Horsted Keynes	1.0 [#]	3.2	0.0	0.0	4.3 [*]
Hurstpierpoint and Sayers Common	0.0	15.2	1.6	0.0	16.9
Lindfield	0.0	0.4	0.0	0.0	0.4
Lindfield Rural	0.0	0.0	0.0	0.0	0.0
Slaugham	0.0	10.1	0.0	0.0	10.1
Twineham	0.0	1.4	0.0	0.0	1.4
West Hoathly	0.0	3.1	0.0	0.0	3.1
Worth	0.0	2.7	27.4	0.0	30.4 ^{**}
TOTAL	1.0	153.4	43.2^{##}	24.2	222.3^{***}

* - Includes 0.1 Ha of potential expansion land on existing site at existing brickworks at Site 76, Freshfield Lane, Danehill. Not a current B Class Use.

** - Includes 0.3 Ha of potential expansion land on existing site at Site 37, Crawley Garden Centre, Copthorne Road. Not a current B Class Use.

*** - Includes 0.4 Ha of potential expansion land on above existing sites

- This relates to Site 82, Horsted Keynes Station, Station Approach.

- This is the total land figure, including potential expansion land.

Note: Figures rounded to one decimal point, so totals may not sum.

Potential Employment Land Supply

4.30 Potential employment land supply is a reflection of individual sites' suitability, availability and achievability measured against the range of criteria laid out in Section

3. The analyses set out in this sub-section are based on the findings of the Site Survey Assessment and should be read in conjunction with the individual site analysis and conclusions provided in **Appendix 2** and the maps for each site included at **Appendix 3**.

4.31 At Table 4.8, the Site Survey Assessment identifies approximately 10.5 hectares was considered as 'deliverable' (i.e. suitable, available and achievable for employment development in the immediate five-year period).

4.32 A further 56 hectares was concluded to be developable within the next 6-11 years and 10 hectares developable beyond 11 years.

4.33 The main locations of 'deliverable' potential employment land for future supply include:

- Albourne (4.4 hectares); and
- Worth (4.7 hectares).

4.34 The main locations of 'developable' potential future employment land supply (within 6 to 11 years) are Bolney, Hassocks, Hurstpierpoint and Slaugham.

Table 4.8: Breakdown of Potential Employment Land in Mid Sussex by Proposed Development Status (Hectares)

Potential Employment Land (Total Size Ha)	Potential - Deliverable	Potential – Developable within next 6 – 11 years	Potential – Developable beyond next 11 years
Albourne	4.4	0.0	0.0
Ashurst Wood	0.0	0.0	0.0
Balcombe	0.0	0.0	0.0
Bolney	0.8	2.5	1.8
Burgess Hill	0.6	0.0	0.0
Copthorne and Worth	0.0	0.0	0.0
Crawley Down	0.0	0.0	0.0
Cuckfield	0.0	0.0	0.0
East Grinstead	0.0	0.0	0.0
Hassocks	0.0	3.5	3.4
Haywards Heath	0.0	0.0	0.0
Horsted Keynes	0.0	0.0	0.0
Hurstpierpoint and Sayers Common	0.0	40.3	0.8
Lindfield	0.0	0.0	0.0
Lindfield Rural	0.0	0.0	0.0
Slaugham	0.0	9.9	4.5
Twineham	0.0	0.0	0.0
West Hoathly	0.0	0.0	0.0
Worth	4.7	0.0	0.0
TOTAL	10.5	56.1	10.5

Potential Employment Land by Use Class

- 4.35 Table 4.9 summarises how future potential employment sites may be distributed across the B Use Classes. The distribution of existing sites across the B Use Classes is also presented, but excluding existing sites that may be suitable for release for other uses.
- 4.36 Table 4.9 concludes that there are 276.4 hectares of existing and potential employment land supply in Mid Sussex District for the plan period (including 14.4 hectares of proposed allocation and 16.6 hectares of commitments).
- 4.37 Excluding those elements of existing sites that are in non-B Use Classes (50.7 Ha), the overall total of B Use Class employment land potential is 225.7 hectares (excluding proposed allocations and commitments). Of this total, approximately 77 hectares (34%) comprises future potential employment sites.

Table 4.9: Distribution of Existing and Potential Sites by B Use Class and Mixed Use Opportunity

Use	B1a/b	B1c	B2	B8	Mixed B	Other	Non Commercial	Total (Ha)
Potential Sites								
Industrial Park	0.5	1.4	1.4	1.4	0.0	0.0	0.0	4.7
Office Park	40.3	0.0	0.0	0.0	0.0	0.0	0.0	40.3
Mixed Use Park	8.0	4.8	4.8	14.5	0.0	0.0	0.0	32.1
Potential Total (Ha)	48.8	6.2	6.2	15.9	0.0	0.0	0.0	77.1
Existing Sites (excluding 'release' sites)								
Existing Total (Ha)	29.7	10.6	12.8	12.4	83.2	49.6	1.1	199.3*
Overall Total (Ha)**	78.5	16.8	19.0	28.3	83.2	49.6	1.1	276.4

Source: CCL Site survey, 2016

* - Figures not directly comparable with Table 4.7 as based on aggregate analysis of existing sites, rather than breakdown by development status.

** - Figures exclude proposed allocations (14.4 hectares) and commitments (16.6 hectares).

Size of Potential Employment Sites

- 4.38 Table 4.10 identifies the number of potential sites in terms of how likely they are to come forward for development in terms of timescale.
- 4.39 Approximately 37% of potential employment sites have the potential to come forward within the next five years, with 26% having the potential to come forward in the next 6 to 11 years' time period, and approximately 37% in the period beyond 11 years.

Table 4.10: Breakdown of Potential Employment Land in Mid Sussex by Development Potential (Number of Sites)

Hectare Range	Potential - Deliverable	Potential - Developable within next 6 - 11 years	Potential - Developable beyond next 11 years	Total
0-1	5	0	2	7
1.1 - 2.49	0	1	3	4
2.5 - 4.9	2	2	1	5
5 - 9.9	0	1	0	1
10 - 19.9	0	0	1	1
20+	0	1	0	1
TOTAL	7	5	7	19

Strategic Employment Sites

- 4.40 The NPPF advises at paragraph 21 that in drawing up Local Plans, local planning authorities should set criteria or identify strategic sites for local and inward investment to match the strategy, and to meet anticipated needs over the Local Plan period.
- 4.41 Strategic or key sites can be defined in a number of ways. For the purposes of this employment land supply assessment, existing strategic sites have been defined with reference to:
- **Size – the scale of employment activity;**
 - **Clustering of similar B Use Class employment activities or sectors;**
 - **Location and prominence/visibility;**
 - **Support for the wider sub-regional/regional economy or rural economy.**
- 4.42 The common thread is that such sites represent important and critical parts of the District's employment land supply covering a range of B Use Class employment activities.
- 4.43 Such sites are characterised by a wide range of occupiers and employment activities and together demonstrate the strength, diversity and attractiveness of Mid Sussex to business from across a wide range of sectors. Overall, strategic employment land and sites represent a broad spectrum of employment land and job opportunity for the District.
- 4.44 A total of ten strategic employment sites have been identified that together provide an extensive and wide variety of B Use Class employment floorspace for the District.
- 4.45 All of the strategic sites are considered to have an essential role and function in supporting the local economy; in addition, a number have a distinct sub-regional role due to the unique nature and characteristics of the floorspace and facilities they provide. Together, the strategic sites remain important components in the District's overall employment land offer.
- 4.46 In more detail, the sites considered through this analysis to form strategic or key employment land in the District are:
- **Bolney Grange Business Park (Site 8):** 9.6 Ha – the business park is extensive and well established. It offers a scale of employment activity and a cluster of similar B Use Class activities together with some opportunities for intensification and expansion. The site has a good strategic location with regard to links to the A23 and A2300. While prominence and visibility is more limited, the site is well recognised within the commercial property market.
 - **Sussex House, The Brow (Site 23):** 1.6 Ha – Sussex House represents one of the few large B1 office facilities in Burgess Hill. The site is highly prominent within the town and is occupied by an international business occupier. The facilities have recently been refurbished and enhanced and the floorspace offers a

clear opportunity to support the sub-regional/regional office economy. With few other office developments of this scale and nature in Burgess Hill, Sussex House represents a key office facility in the town.

- **Victoria Business Park West (Site 24):** 21.3 Ha; and **Victoria Business Park East (Site 25):** 32.8 Ha – these two mixed industrial areas form a very significant portion of the employment land supply for the District. The areas are contiguous with each other and act as a functional whole, albeit with different characteristics and levels of floorspace quality. The two areas offer a clear clustering of industrial floorspace (with a variety of sizes and types of accommodation) and the Site Survey Assessment noted low levels of stock vacancy. By virtue of their nature and scale, the two areas are prominent and are well located with respect to the facilities/services offered in Burgess Hill town centre (as well as within the sites themselves). They have good access to the strategic road network.
- **Birches Industrial Estate (Site 46):** 13.2 Ha; **Felbridge Centre (Site 48)** 2 Ha; **Imberhorne Way (Site 49)** 1.9 Ha; **Independent Business Park (Site 50):** 1.7 Ha – these sites together form a larger, prominent cluster of industrial and related office employment floorspace in East Grinstead. While each site is distinct from the others, there is a commonality in terms of the role and function of the sites for employment purposes, the quality of the business environment offered, and a diversity of large

and smaller occupiers. The Site Survey Assessment noted limited levels of vacancy and opportunities for expansion or intensification.

- **Perrymount Road (Site 74):** 12.5 Ha – Perrymount Road offers a cluster of B1a office floorspace in Haywards Heath. The site is effectively an extended linear ‘parade’ of individual office buildings. The site is well located in terms of strategic access to road and public transport facilities (including rail) and has easy access to supporting services and facilities which are offered on-site and within Haywards Heath Town Centre. The office floorspace is generally of good condition and limited levels of vacancy were noted through the Site Survey Assessment. The site is considered to form a strategic and key part of the employment land supply in that it provides a concentrated area of office floorspace, and meets the needs of local and regional/national business occupiers (particularly professional and financial/business services) who need office accommodation in Haywards Heath or the District as a whole.
- **Avtrade Global, Reeds Lane (Site 102):** 9.8 Ha – this site is set within a rural location to the west of Sayers Common. It is a standalone B1a office and B8 distribution facility built recently to a very high standard with dedicated facilities, servicing and access. The site supports the aviation industry sector that is particularly important to the Gatwick Diamond area. The site’s strategic location and

access to the A23 is an important facet, although it is noted that local accessibility for services and facilities is limited at best. With land available for potential future expansion or intensification it represents a key employment facility within the District.

Employment Land Development Trajectory

- 4.47 The NPPF and NPPG require that a future development trajectory is identified for residential land. There is however no similar requirement for employment land provision. It is useful however to establish a potential development trajectory for employment land even at a broad level in order to help ensure that there is a future choice and mix of employment sites and floorspace.
- 4.48 An employment land development trajectory can therefore be used to help proactively and positively support economic growth and form the basis for future plan-monitoring.

- 4.49 Table 4.11 provides a summary employment land development trajectory for identified potential employment sites in Mid Sussex. The trajectory is based on the Site Survey Assessment and the conclusions/recommendations drawn for each site. It is important to note that the conclusions and recommendations drawn on individual sites and the future trajectory are to offer an indication of the scale of potential future supply. It does not provide any formal allocation or designation of the sites in question which remains a process for the District Plan to undertake and consult on as appropriate.
- 4.50 Table 4.11 identifies that there are approximately 108 hectares of potential deliverable or developable employment land in the District (existing and potential) in the plan period to 2031.
- 4.51 27 hectares of potential land could be delivered within the next five-year period, assuming development proposals are forthcoming. A further 56 hectares could potentially be developed within the next 6 to 11 years, with approximately 25 hectares being developable beyond 11 years.

Table 4.11: Mid Sussex Development Trajectory of Potential Employment Sites (Hectares)

Development Trajectory	Hectares
Potential – Deliverable (1 – 5 years)	27.1
Potential - Developable (within next 6 - 11 years)	56.1
Potential - Developable (11+ years)	24.9
TOTAL*	108.1

Source: CCL Site Survey, 2016

* - Includes the proposed District Plan allocation of 14.4 Ha (Site 33) and commitments of 16.6 Ha (Sites 19 and 87) = 31 Ha total

Future Employment Generation

- 4.52 An assessment of the possible scale of new jobs that could be associated with the potential employment sites has been undertaken. This is in order to provide an understanding of the broad number of jobs that the potential future employment land might have the capacity to support.
- 4.53 In order to assess the potential level of jobs a standard set of employment creation assumptions has been applied to each potential site. The assumptions have been applied on a consistent basis relevant to the potential future B Use Classes that each site might support. The key components of this process were as follows:

- identifying if the potential employment land site was a town centre or out of town location;
- assessing if the employment site would be a best categorised as a distribution park, industrial park, office park or mixed business park and then assigning a distribution of B Use Class activities across each of these different types of development;
- applying a market-based estimation of plot ratios by B Use Class and by town centre and out of town location as follows:

Town Centre locations:

- B1a/b – 1.1
- B1c – 0.5

- B2 – 0.5
- B8 – 0.5
- Mixed B Use – 0.7

Out of Town locations:

- B1a/b – 0.4
- B1c – 0.4
- B2 – 0.4
- B8 – 0.35
- Mixed B Use – 0.4

- applying standard employment density rates, based on the *Homes and Communities Employment Densities Guide, 2nd Edition* (2010). The employment density rates are expressed as the amount of sq.m per employee as follows:

Town Centre (sq.m per employee):

- B1a/b – 12
- B1c – 47
- B2 – 47
- B8 – 70
- Mixed B Use – 30

Out of Town (sq.m per employee):

- B1a/b – 15
- B1c – 47

- B2 – 47
- B8 – 70
- Mixed B Use– 30

4.54 The job creation capacity assessment results in an estimated capacity potential of some 18,573 full time equivalent jobs for the potential employment land sites; in excess of the District Plan's stated job creation targets for the plan period.

4.55 In more detail, by B Use Class this total employment capacity comprises:

- B1a/b – 15,278
- B1c – 913
- B2 – 913
- B8 – 1,469

4.56 It is important to recognise that these employment capacity figures are only high level estimates. They are an indication of the potential capacity of these sites in employment terms, and are best viewed as a strategic guide.

4.57 Detailed designs and layouts for the development of each site, together with the operational use of sites by specific occupiers will have a significant bearing on the determining the actual levels of employment potential.

Employment Land Delivery Risks

- 4.58 The delivery of additional employment land, either from the intensification or extension of existing sites or through the development of new sites, is affected by a range of risks and barriers. The Site Survey Assessment has examined the principal issues and possible risks for employment land development for each existing and potential site and relevant information is recorded in **Appendix 2**.
- 4.59 There are a number of common themes that emerge from the Site Survey Assessment and also more generally given the current national policy context for use and development of B Use Class employment land:
- **Protected environments and landscapes** – much of Mid Sussex District is identified and protected for its sensitive environments and landscapes. There are a number of international and national level designations covering much of the District, including the High Weald Area of Outstanding Natural Beauty. The supply and delivery of employment land is constrained within these designated areas, and often more widely, given the capacity of the landscape outside urban settlement boundaries to accommodate new development. While this does not preclude employment development from occurring, it can place an additional cost on the design and layout of new sites and premises as well as reduce the potential developable area of some sites that are covered by, or in close proximity to

designated environmental or landscape areas. There are a number of sites examined in the Site Survey Assessment that have highlighted suitability and achievability risks due to the presence of protected environments and landscapes. In some instances, the protected areas cover locations with good levels of strategic access, available land or particularly prominent / highly visible sites. The Site Survey Assessment has identified these, and where appropriate, possible employment land sites have been discounted from the potential supply. In order for such sites to form part of the supply in future, they would require positive identification and allocation through the District Plan or within an appropriate Neighbourhood Plan. Applications for such employment uses would of course then require detailed evaluation and testing of their design, access, landscape and environmental effects through the planning application decision-taking process.

- **Access to sites, services and strategic location** – the ability to adequately access employment land and sites is a critical risk factor to future development. While many of the sites included in the Site Survey Assessment are well located in proximity to the strategic road network (motorways and A roads) as well as to supporting services/facilities found in the main settlements, there are equally a large number of potential employment sites that are restricted by access problems. The Site Survey Assessment has identified these in broad terms and discounted possible sites where accessibility is

particularly poor. In other situations, employment land development applications or future allocations through the District Plan will need to find effective solutions to location and access issues, and such remedies will need to reflect the particular type, size and nature of the B Use Class intended.

- **The function of Permitted Development Rights for Change of Use from B Use Class to Residential** – the effects of change of use through the Permitted Development Rights (PDR) prior approval process has had a limited effect to date in the District, however the Site Survey Assessment has identified a number of existing employment sites where there is evidence of a loss of B Use Class floorspace through conversion to residential activity. The Government has recently confirmed (March 2016) that PDR rights for conversion of B1 offices to residential use is to be made permanent (previously these were available as for a temporary period) from April 2016. There are also temporary PDR rights to convert B1c (light industrial) floorspace for residential purposes (subject to a prescribed 500 sq. m size limit). With the confirmation that these PDR rights are to be made permanent, there is a risk that existing employment floorspace (particularly B1 offices) will be increasingly subject to loss during the plan period. While such losses are not indicative of a lack of commercial demand, they are often a reflection of the relative

values attached to residential units over and above B Use Class values. This is the case in Mid Sussex as it is elsewhere in much of the South East.

5. CONCLUSIONS AND RECOMMENDATIONS

Introduction

- 5.1 This section provides a brief summary of the main analysis and conclusions arising in the Strategic Employment Land Availability Assessment. It outlines recommendations for the District Council for the existing and future supply of employment land.
- 5.2 National policies and practice set out in the NPPF and NPPG include the need to assess the existing and potential supply of B Use Class employment land and sites.
- 5.3 The SELAA work set out in this Report provides that assessment and it has been based on an extensive process of identification and assessment of 140 possible sites across the District. These sites were identified from a range of sources, including a Call for Sites process undertaken by the Council as well as re-examination of sites identified in the Strategic Housing Land Availability Assessment (SHLAA) and drawing from the Northern West Sussex Economic Growth Assessment (EGA). In addition, the emerging District Plan and a number of 'made' and draft Neighbourhood Plans have identified employment

sites and proposed allocations. These have been included for assessment.

- 5.4 The Site Survey Assessment examined 118 existing and potential sites (having discounted a number of other sites that were either too small or located in areas considered to have primary constraints to employment development).
- 5.5 Each identified existing or potential site was then subject to a site survey combining desktop and primary, on-site, assessment to consider their suitability, availability and achievability for B Use Class activities.
- 5.6 Section 4, together with the overarching Site Survey Assessment framework set out in **Appendix 2**, provide details of each individual site assessment and the conclusions and recommendations arising in each case. Site location plans are set out in **Appendix 3**.
- 5.7 **It is important to note that the site conclusions and recommendations do not constitute any formal status or indication of future allocation, release or use of land and sites.** They form recommendations for consideration of the District Council in preparing the District Plan and any subsequent Site Allocations Plan.

Employment Land Demand

- 5.8 The demand and need for employment land has not been within the scope of the SELAA and it is not the purpose of role of the SELAA to balance employment land demand and supply.

5.9 Reference to employment land demand in the District has been made for contextual purposes and this is set out in evidence contained in other studies, namely:

- the Northern West Sussex EGA (2014) that identified a need for 30.7 hectares (baseline scenario) of new employment land up to 2031;
- the Burgess Hill Strategic Employment Sites Study (2015) which provided an updated employment land demand analysis (showing needs from 19.1 to 31 Ha) and indicated a reasonable range of 25 – 30 Ha of employment land need (depending on the growth scenario) and taking into account the need for Mid Sussex to make a contribution to accommodate unmet employment land needs arising elsewhere amongst neighbouring authorities;
- the Draft District Plan, Focused Amendments (November 2015) which identifies the need to provide 330 net new jobs per annum in the District over the plan period 2014 – 2031;
- the Mid Sussex Housing and Economic Development Needs Assessment (March 2015 and updated November 2015) that outlines a job growth of between 282 and 390 per annum over the plan period.

Supply of Employment Land

5.10 The existing and potential supply of employment land was examined in Section 4 of the report.

Existing Supply

5.11 Overall existing supply amongst the sites surveyed and assessed totalled 222.3 Ha with 42 Ha in B1 (office) use; 12 Ha in B1c (light industrial); 13 Ha (general industrial); and 12 Ha of B8 (storage and distribution). 93 Ha is in mixed B use.

5.12 The principal locations of existing supply are found mostly in the larger settlements and their immediate hinterlands: East Grinstead; Haywards Heath; Burgess Hill; Hurstpierpoint and Sayers Common; Bolney and Pease Pottage.

Potential Future Supply

5.13 Turning to potential future employment land supply, some 77 hectares was identified as either 'deliverable' or 'developable'. 10.5 hectares of this potential was concluded to form a 'deliverable' supply (i.e. suitable, available and achievable now or in the five-year period). A further 56 Ha was concluded to be 'developable' in the 6 – 11 years period; and 10.5 Ha in the period 11+ years.

5.14 The potential supply of employment land represents a 'reservoir' or pool of land and sites that could be used for B Use Class development in future. As noted, the

assessment and conclusions drawn for each site do not confer any formal status, however they provide the basis for the District Council to make future employment land site allocations as necessary during the plan period.

Strategic Sites

- 5.15 The Site Survey Assessment has also considered the potential to identify strategic or key employment sites and a series of criteria were used to reflect scale and size, prominence/visibility, sectoral focus, clustering, or the ability to support the wider sub-regional/regional economy.
- 5.16 Applying these broad characteristics to the surveyed sites, there are ten existing sites which might be considered as more strategic and important locations or groups of sites in the District:
- Bolney Grange Business Park (Site 8);
 - Sussex House, The Brow (Site 23);
 - Victoria Business Park West and East (Sites 24 and 25);
 - Birches Industrial Estate (Site 46); Felbridge Centre (Site 48); Imberhorne Way (Site 49); and Independent Business Park (Site 50);
 - Perrymount Road, Haywards Heath (Site 74);
 - Avtrade Global, Reeds Lane (Site 102).

Job Creation and Generation

- 5.17 The capacity of the potential employment sites to support new jobs in the plan period was considered through a high-level assessment was made (using standard plot ratios, employment densities and assumptions for each site).
- 5.18 This analysis identified job creation capacity of some 18,573 full time equivalent jobs for the potential employment land sites; in excess of the District Plan's stated job creation targets for the plan period. This total was comprised of:
- B1a/b – 15,278 jobs
 - B1c – 913 jobs
 - B2 – 913 jobs
 - B8 – 1,469 jobs
- 5.19 These employment capacity figures are only high level estimates. They are an indication of the potential capacity of these sites in employment terms, and are best viewed as a strategic guide.

Recommendations

5.20 The following recommendations are made:

- **R1:** that existing employment land and sites are retained and protected in B Use Class activities as concluded from the Site Survey Assessment and as set out in **Appendix 2** and **3**.
- **R2:** that the ‘pool’ of potential employment land and sites assessed through the Site Survey Assessment form the basis for future B Use Class employment land provision. This ‘pool’ of sites should be used as the basis for any future Site Allocations Development Plan and as the basis for planning decision-taking as appropriate.
- **R3:** that consideration is given to the release of employment land and sites from B Use Class activity as concluded from the Site Survey Assessment and as set out in **Appendix 2** and **3**. This is in order to regularise the planning situation reflecting current activity and uses on certain sites; and to ensure that the District does not seek to protect or retain sites for B Use Class employment use in the long term where there is no reasonable prospect of the site being used for that purpose (in accordance with NPPF paragraph 22).
- **R4:** that the following existing sites be considered as forming strategic employment sites that are key to the District’s current economic offer and are protected for B Use Class activities in future:
 - Bolney Grange Business Park (Site 8);
 - Sussex House, The Brow (Site 23);
 - Victoria Business Park West (Site 24);
 - Victoria Business Park East (Site 25);
 - Birches Industrial Estate (Site 46);
 - Felbridge Centre (Site 48);
 - Imberhorne Way (Site 49);
 - Independent Business Park (Site 50);
 - Perrymount Road, Haywards Heath (Site 74);
 - Avtrade Global, Reeds Lane (Site 102).

APPENDIX 1: SITE SURVEY ASSESSMENT INDICATORS DESCRIPTION

Assessment Criteria	Objective	Assessment/Data Source	Performance Category / Rationale
Descriptors			
1. Site Ref No.	Unique identifier	CCL site numbering	N/A
2. Site Name/Location	Name and broad location of site	Ordnance Survey mapping	N/A
3. Settlement / Parish	Parish location	MSDC parish and ward maps	N/A
4. Source of Supply	Details of the source of supply (i.e. where was the site identified from)	Call for Sites, SHLAA excluded sites, District Plan, Neighbourhood Plans, Northern West Sussex Economic Growth Assessment, West Sussex County CILLA, planning commitments/permissions, aerial imagery, site survey	N/A
5. Existing / Potential Employment Land	Whether the site forms part of the existing employment land supply or a possible future site	CCL site assessment	Site is / is not part of the existing B Use Class employment land supply
6. OS Grid Reference	Locational data using O.S grid referencing	Ordnance Survey	N/A

7. Location Size/Potential (Ha)	Identification of site size	Google Earth Pro map measurements, data from sources of supply information, data from planning permissions, allocations and commitments	Site size identified from existing data or measured using Google Earth Pro
8. Vacant Area (Ha)	Identification of size and extent of any vacant area within the site	CCL site assessment	Site vacant area size identified from existing data or measured using Google Earth Pro
9. Total Commercial Floorspace (sq.m)	Measure of existing commercial (B Use Class) and other commercial (non-B Use Class) use	CCL site assessment	Size categorised from site survey assessment and checked against existing records: <ul style="list-style-type: none"> • <2,500 sq. m • 2,500 – 5,000 sq. m • 5,001 – 7,500 sq. m • 7,501 – 10,000 sq. m • 10,001 – 25,000 sq. m • 25,0001 – 50,000 sq. m • 50,000 sq. m +
10. Number of Commercial Units	Quantification of number of existing B Use Class buildings/structures within the site	CCL site assessment	Site survey assessment of number of commercial units: <ul style="list-style-type: none"> • 1 • 2 – 5 • 6 – 10 • 11 – 20 • 21 – 50 • 50+

11. Number of Vacant Commercial Units	Quantification of number of vacant existing B Use Class buildings/structures within the site	CCL site assessment	Site survey assessment of number of vacant commercial units: <ul style="list-style-type: none"> • <2.5% of total units vacant • 2.6% – 5% of total units vacant • 6% - 10% of total units vacant • >10% of total units vacant
12. Current Land Use Mix	Identification of the overall proportional mix of uses within the site (B and non-B Use Classes)	CCL site assessment	Site survey assessment of the proportional balance of B Use Class and other Uses/Activities on sites
Suitability			
13. Previously Developed Land	Confirmation of whether the site is brownfield (previously developed land) or greenfield	CCL site assessment	<ul style="list-style-type: none"> • Green – Previously Developed Land used for B Use Class employment activities • Amber – PDL for commercial/residential or other uses • Red – Greenfield land
14. Building Age	Age of the building stock on site	CCL site assessment	Site survey assessment of building age categorised as: <ul style="list-style-type: none"> • Pre-1914 • 1915 – 1940 • 1940 – 1970 • 1970 – 1990 • 1990 – 2010

			<ul style="list-style-type: none"> • New (post 2010)
15. Building Quality	Quality of the stock on site	CCL site assessment	<p>Site survey assessment of building quality (external inspection and observation):</p> <ul style="list-style-type: none"> • Green – Good condition (new build/recent refurbishment) • Amber – Average repair and quality • Red – Poor repair, dilapidated state or major visible quality problems
16. Composite Building Quality	Composite measure of age and quality indicators	CCL site assessment	<p>Site survey assessment composite conclusion:</p> <ul style="list-style-type: none"> • Green – Post 1990 age and good repair/new build or recent refurbishment • Amber – Pre-1990 age and good repair/condition • Red – Pre-1990 and dilapidated state or major visible problems
17. Surrounding Land Uses	Broad assessment of neighbouring land uses / activities	CCL site assessment	Site survey assessment of surrounding land uses and activities.
18. Topography	Broad assessment of site topography and slope	Ordnance Survey	<p>Site survey assessment of topography combined with OS mapping review:</p> <ul style="list-style-type: none"> • Green – flat or mostly flat

			<ul style="list-style-type: none"> • Amber – mixed topography but not a constraint to development • Red – steep or significantly undulating topography that would most likely preclude or significantly restrict B Use Class development
19. Shape	Confirmation of the regularity of the shape of the site	CCL site assessment	<p>Site survey assessment:</p> <ul style="list-style-type: none"> • Green – regular shape • Amber – mostly regular shape • Red – irregular shape unsuited to B Use Class development
20. Pylons/Major Infrastructure Constraints	Presence or absence of major infrastructure related constraints to development (particularly electricity pylons)	Ordnance Survey, CCL site assessment, Figure 2.10 of Capacity of Mid Sussex to Accommodate Development Study (June 2014), LUC	<p>Site survey assessment combined with OS mapping review and analysis of gas pipeline mapping:</p> <ul style="list-style-type: none"> • Green – none • Average – constraining infrastructure within 100m of site boundaries • Red – constraining infrastructure on-site
21. Landscape Capacity for Development	Landscape capacity and ability to accommodate development	Capacity of Mid Sussex to Accommodate Development Study (June 2014), LUC	<ul style="list-style-type: none"> • Green – High capacity to accommodate development • Amber – Medium High/Medium capacity to accommodate development

			<ul style="list-style-type: none"> • Red – Medium Low/Low capacity to accommodate development
Availability			
22. A Road Access	Distance and therefore ability to access the primary road network	Based on Figure 5.1 of Capacity of Mid Sussex to Accommodate Development Study (June 2014), LUC	<ul style="list-style-type: none"> • Green – access <1 mile • Amber – access 1-3 miles • Red – access >3 miles
23. Motorway Junction Access	Distance and therefore ability to access the motorway network	Based on Figure 5.1 of Capacity of Mid Sussex to Accommodate Development Study (June 2014), LUC	<ul style="list-style-type: none"> • Green – access <3 miles • Amber – access 3-5 miles • Red – access >5 miles
24. Bus Stop Access	Distance and therefore ability to access public bus transport services	Based on Figure 5.1 of Capacity of Mid Sussex to Accommodate Development Study (June 2014), LUC	<ul style="list-style-type: none"> • Green – fully within bus stop zone • Amber – adjacent to bus stop zone • Red – outside bus stop zone
25. Train Station Access	Distance and therefore ability to access railway station facilities	Based on Figure 5.1 of Capacity of Mid Sussex to Accommodate Development Study (June 2014), LUC	<ul style="list-style-type: none"> • Green – within Core Train station zone • Amber – within 1km of Core Train Station zone • Red - >1km or outside Core Train station zone
26. Distance to Services/Facilities	Distance and therefore ability to access key supporting services and facilities	Based on Figure 5.1 of Capacity of Mid Sussex to Accommodate	<ul style="list-style-type: none"> • Green – within Convenience, Leisure, GP and School zones

		Development Study (June 2014), LUC	<ul style="list-style-type: none"> • Amber – within either Convenience, Leisure, GP or School zones • Red – no key services or outside relevant zones
27. Parking	Availability and quality of on-site vehicular parking	CCL site assessment	<ul style="list-style-type: none"> • Green – Good parking provision and well organised and arranged on site • Amber – Average or adequate parking provision and arrangement on site • Red – Poor, inadequate parking provision or arrangement
28. Servicing	Availability and quality of on-site vehicular servicing (for loading, deliveries, etc.)	CCL site assessment	<ul style="list-style-type: none"> • Green – Good servicing provision and well organised and arranged on site • Amber – Average or adequate servicing provision and arrangement on site • Red – Poor, inadequate servicing provision or arrangement
29. Site Access Constraints	Composite measure and assessment of site access and egress	CCL site assessment	<p>Composite conclusion on site accessibility constraints:</p> <ul style="list-style-type: none"> • Green – no constraints identified • Amber – minor road junction width/visibility splay issues or potential for some conflict with pedestrians/other road users • Red – major road junction width/visibility or likely conflict with pedestrians/other road users

Achievability			
30. Opportunities for Expansion	Potential for expansion or intensification of the site for B Use Class employment purposes	CCL site assessment	Site survey assessment: <ul style="list-style-type: none"> • Green – good opportunities on site for expansion or intensification of B Use Class employment activities • Amber – limited existing site area/land available for expansion or intensification. Opportunities for smaller scale expansion. Opportunities for expansion/intensification but limited potential • Red – no existing on-site land area capable of expansion, intensification
31. Visibility and Prominence	Economic and market visibility and prominence of the site	CCL site assessment	Site survey assessment: <ul style="list-style-type: none"> • Green – high market visibility and prominent site location • Amber – limited market visibility or prominence • Red – no or highly limited market visibility or prominence of the site's location
32. Critical Mass	Assessment of whether the site forms or is close to / distant from	CCL site assessment	Site survey assessment:

	existing clusters of B Use Class employment sites/floorspace		<ul style="list-style-type: none"> • Green – within or part of an existing B Use Class employment cluster of land/sites or floorspace • Amber – close to an existing or planned cluster of B Use Class employment land/site or floorspace • Red – Distant from existing or planned clusters of B Use Class employment land/sites or floorspace
33. Heritage Assets/Listed Building	Presence or absence of designated heritage assets and listed buildings	DEFRA Magic, MSDC records and CCL site assessment	<ul style="list-style-type: none"> • Green – no known heritage or listed building assets • Amber – heritage or listed building assets but likely to be capable of incorporation and compatible within B Use Class employment use • Red – significant heritage or listed buildings representing a major or absolute constraint to B Use Class employment development
34. Other Achievability Risks	Confirmation and record of other risks to achievability of site for development/use for B Use Class employment activities	CCL site assessment	Note of any other significant risks to achievability for B Use Class development
Conclusions/Recommendations			
35. Comments and Conclusion	Overall summary of the site based on summation of the assessment indicators and site survey	CCL site assessment	N/A

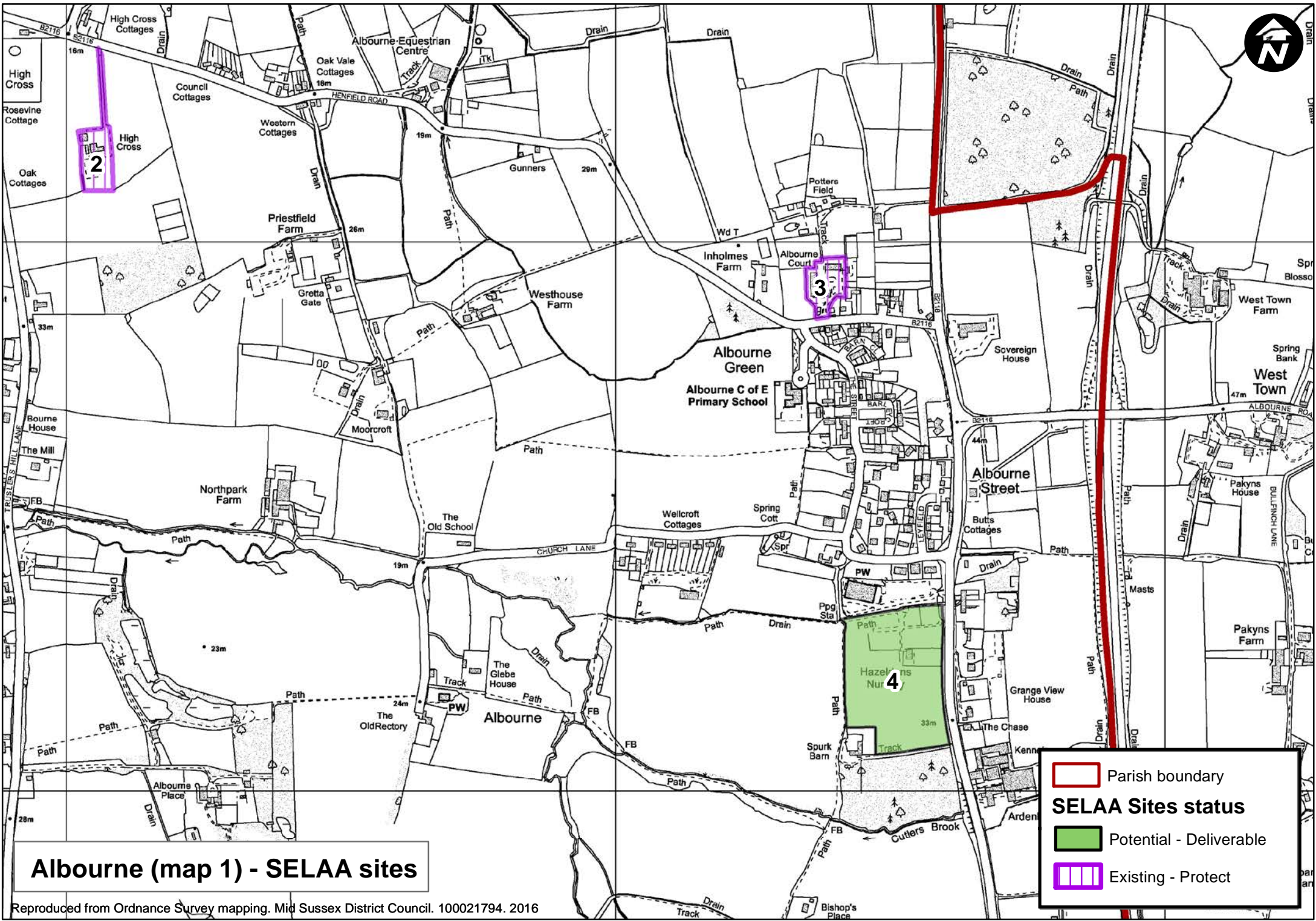
36. Recommendation	Recommendation on the current and future potential for the site to form part of the B Use Class employment land supply	CCL site assessment	Recommendation for future use: <ul style="list-style-type: none"> • Existing: Protect – for future B Use Class employment activity • Existing: Protect and Expand – for future B Use Class employment activity with the opportunity to expand the current use(s) • Existing: Release – release/remove from B Use Class activity in future • Potential: Deliverable (now or within the five year period) • Potential: Developable within next 6 – 11 years – potential for B Use Class development in the medium term plan period • Potential: Developable 11+ years – potential for B Use Class development in the long term plan period • Potential: Developable beyond the Plan period – sites / areas with the possibility of forming part of the B Use Class employment land supply in the next plan period (after 2031). Concluded on the basis of need for comprehensive planning for such areas as part of future plan reviews • Potential: Not Developable – not developable for B Use Class
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			employment activities and discounted from the potential supply of employment sites
37. Potential B Use Class	Conclusion on the range of potential B Use Class employment that may be possible on the site	CCL site assessment	<p>Type or range of potential B Use Class activities:</p> <ul style="list-style-type: none"> • B1a – offices • B1b – research and development • B1c – light industrial • B2 – general industrial • B8 – storage and distribution • None – no potential or use for B Use Class employment

APPENDIX 2: SITE SURVEY ASSESSMENT

Parcel ID	Site Name	Address	Area (Acres)	Current Zoning	Proposed Zoning	Soil Type	Topography	Vegetation	Water Features	Adjacent Land Use	Environmental Concerns	Historical Resources	Archaeological Potential	Geological/Hydrological	Other	Notes	Recommendation																															
113	Reardon Site 501	North	Site Visit	SRV/2	TD 32041 3654	2.8	0	0.2-0.49	3	0	0	0	0	100%	0	0	0	0	100%	FEDL for employment	10/10/80	Average	Average	Agricultural	F70	Regular	None	Low/Medium	2-3	2-4	Good	Good	Good	None	None	None	None	Existing on-site land	High visibility	Subject to environmental assessment	No known heritage resources	The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Listing - Protect and expand	SR 1, SR 2, SR 3				
114	Casey, Village Lane	North	Site Visit	SRV/2	TD 32041 3654	6.7	0	0.01-1.50	5	0	30%	0	0	70%	0	0	0	0	100%	FEDL for employment	10/10/80	Average	Average	Agricultural	F70	Regular	None	Low/Medium	2-3	2-4	Good	Good	Good	None	None	None	None	Existing on-site land	High visibility	Subject to environmental assessment	No known heritage resources	The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Listing - Protect and expand	SR 1, SR 2, SR 3				
115	Land at Barrow Court, The Farm, Turvey Hill Road, County Down	North	SIL/AA	SRV/2	TD 32473 3862	8.84	0	0.2-0.49	4	0	0	0	0	100%	0	0	0	0	100%	FEDL for employment	10/10/80	Average	Average	Agricultural	F70	Regular	None	Medium	1-1	1-1	Good	Good	Good	None	None	None	None	Existing on-site land	High visibility	Subject to environmental assessment	No known heritage resources	The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Listing - Protect and expand	SR 1, SR 2, SR 3				
116	Stranmillis, Stranmillis, County Down	North	SIL/AA	SRV/2	TD 32178 3927	3.3	0	0.2-0.49	1	0	0	0	0	0	100%	0	0	0	0	100%	FEDL for employment	10/10/80	Average	Average	Agricultural	F70	Regular	None	Low/Medium	1-1	1-1	Good	Good	Good	None	None	None	None	Existing on-site land	High visibility	Subject to environmental assessment	No known heritage resources	The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Listing - Protect and expand	SR 1, SR 2, SR 3			
38	Land West of Cappaghine	North	Consent	Promoter	TD 30484 3638	4.72	4.72	-	-	-	0	0	0	0	0	0	0	0	0%	Disallowed	-	-	-	Agricultural	F70	Regular	None	Low/Medium	1-1	1-1	Good	Good	Good	-	-	-	-	None	None	None	None	Existing on-site land	High visibility	Subject to environmental assessment	No known heritage resources	Planning permission recommended, subject to signing of a 50% Agreement for up to 100 homes, 50% for 100 and 50% for 200. The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Monitor - Deliverable	SR 1, SR 2, SR 3
39	Land at Stranmillis, Turvey Hill Road, County Down	North	SIL/AA	Promoter	TD 32177 3761	1.5	1.5	-	-	-	0	0	0	0	0	0	0	0	0%	Disallowed	-	-	-	Residential	F70	Regular	None	Medium	1-1	1-1	Good	Good	Average	-	-	-	-	None	None	None	None	Existing on-site land	Low visibility	Subject to environmental assessment	No known heritage resources	located within the settlement boundary of County Down. The proposed site lies within a medium area of capacity for development. The site is proposed to be used for residential purposes. The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Not Developable	None
40	Land to the West of the Reservoir, Turvey Hill Road, County Down	North	SIL/AA	Promoter	TD 32178 3761	4	4	-	-	-	0	0	0	0	0	0	0	0	0%	Disallowed	-	-	-	Agricultural	F70	Regular	None	Medium	1-1	1-1	Good	Good	Average	-	-	-	-	None	None	None	None	Existing on-site land	Low visibility	Subject to environmental assessment	No known heritage resources	located within the settlement boundary of County Down. The proposed site lies within a medium area of capacity for development. The site is proposed to be used for residential purposes. The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Not Developable	None
41	Land South of Millers Close, County Down	North	SIL/AA	Promoter	TD 32044 3740	1.4	1.4	-	-	-	0	0	0	0	0	0	0	0	0%	Disallowed	-	-	-	Agricultural	F70	Regular	None	Urban	1-1	1-1	Good	Good	Average	-	-	-	-	None	None	None	None	Existing on-site land	Low visibility	Subject to environmental assessment	No known heritage resources	located within the settlement boundary of County Down. The proposed site lies within a medium area of capacity for development. The site is proposed to be used for residential purposes. The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Not Developable	None
42	Stranmillis - Land to the West of Turvey Hill Road, County Down	North	SIL/AA	Promoter	TD 32171 3724	59.76	59.76	-	-	-	0	0	0	0	0	0	0	0	0%	Disallowed	-	-	-	Agricultural	F70	Regular	None	Medium	1-2	2-4	Good	Good	Average	-	-	-	-	None	None	None	None	Existing on-site land	High visibility	Subject to environmental assessment	No known heritage resources	located within the settlement boundary of County Down. The proposed site lies within a medium area of capacity for development. The site is proposed to be used for residential purposes. The site is located within the boundary of the established Reardon Business Centre, and supports a business and retail use with supporting buildings and outdoor storage areas. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment. The site is located within the boundary of the established business centre and is zoned for employment.	Not Developable	None

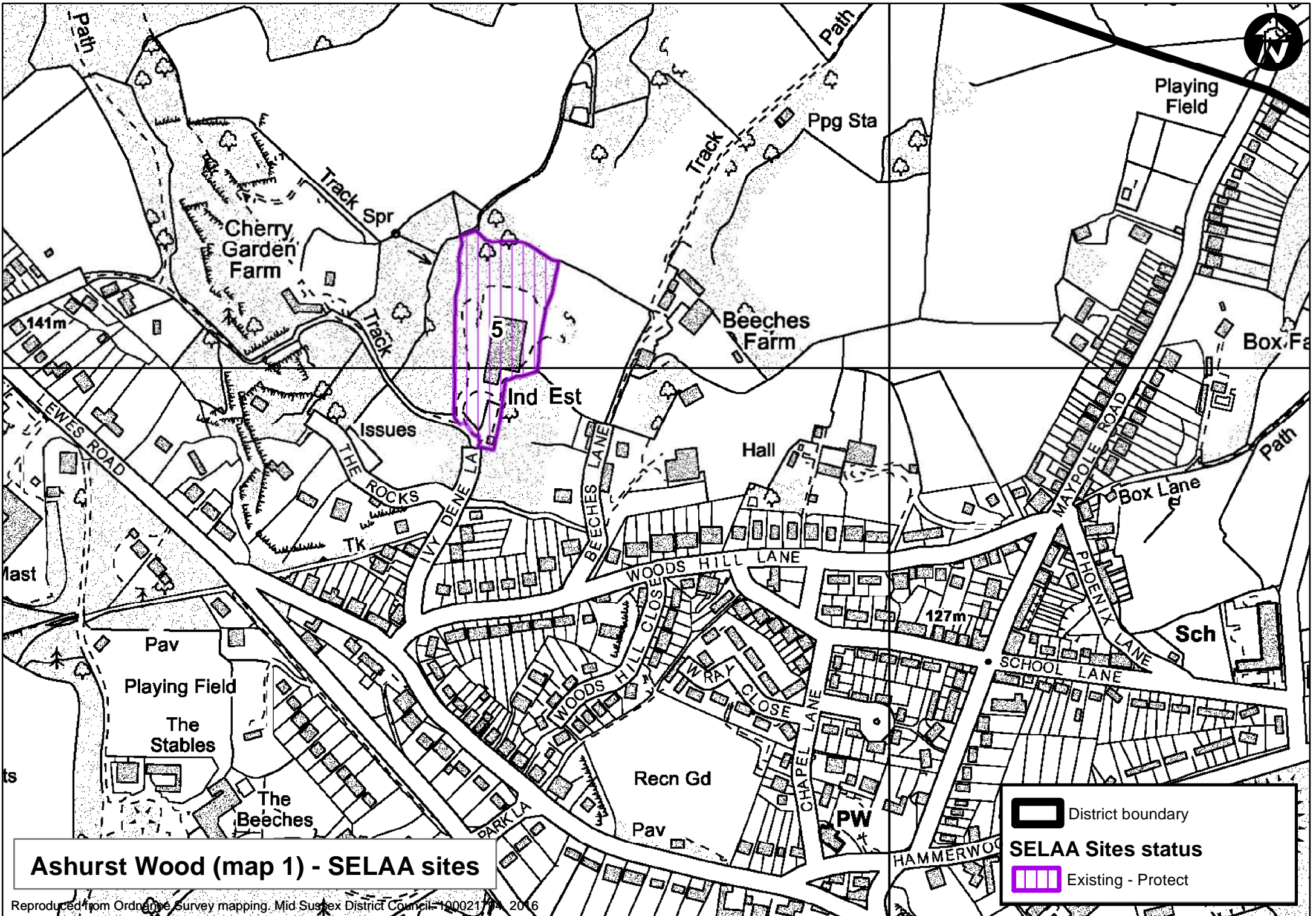
APPENDIX 3: EMPLOYMENT SITE SURVEY MAPS



Albourne (map 1) - SELAA sites

Legend for SELAA Sites status:

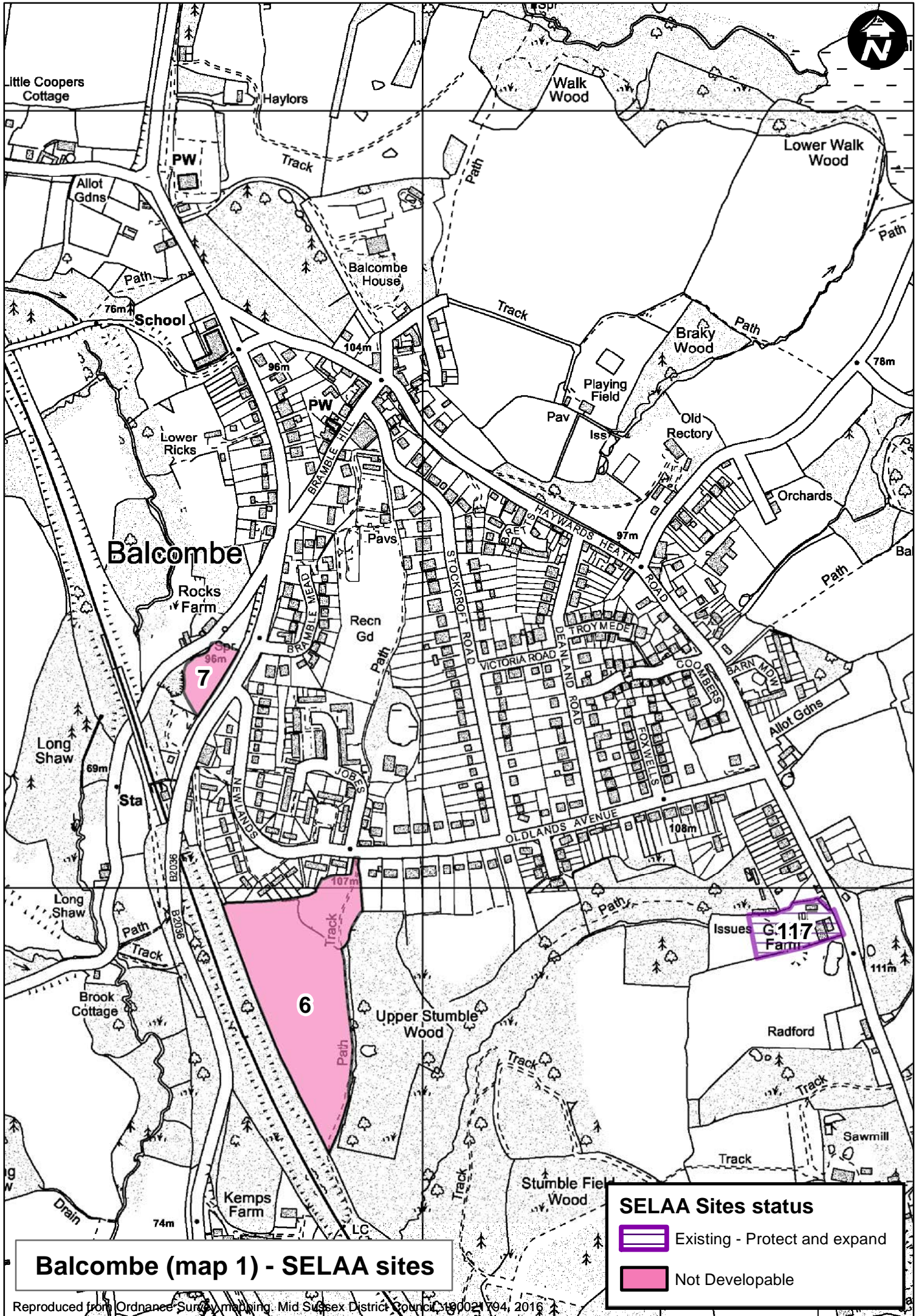
- Parish boundary (Red outline)
- Potential - Deliverable (Green fill)
- Existing - Protect (Purple outline)



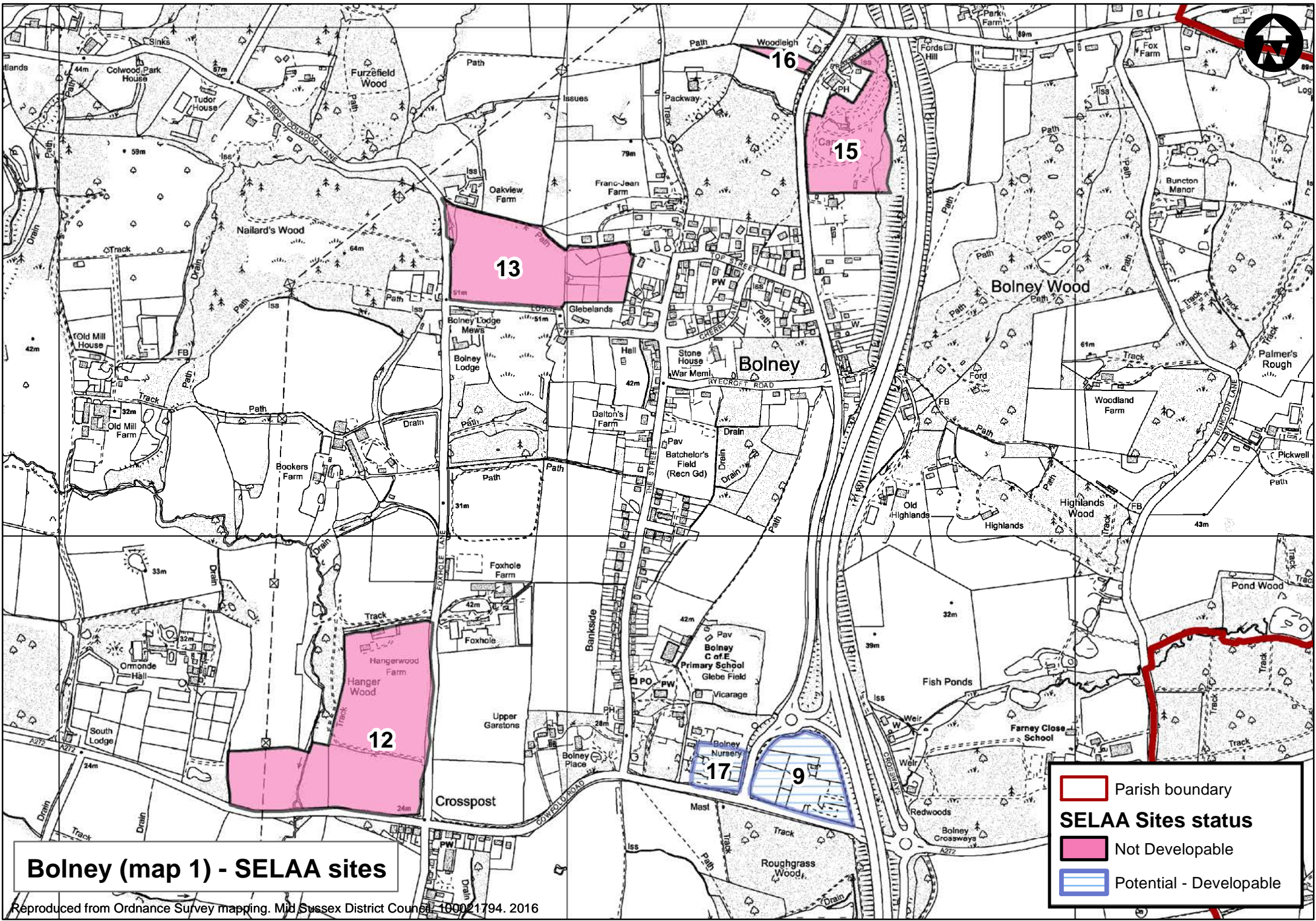
Ashurst Wood (map 1) - SELAA sites

SELAA Sites status

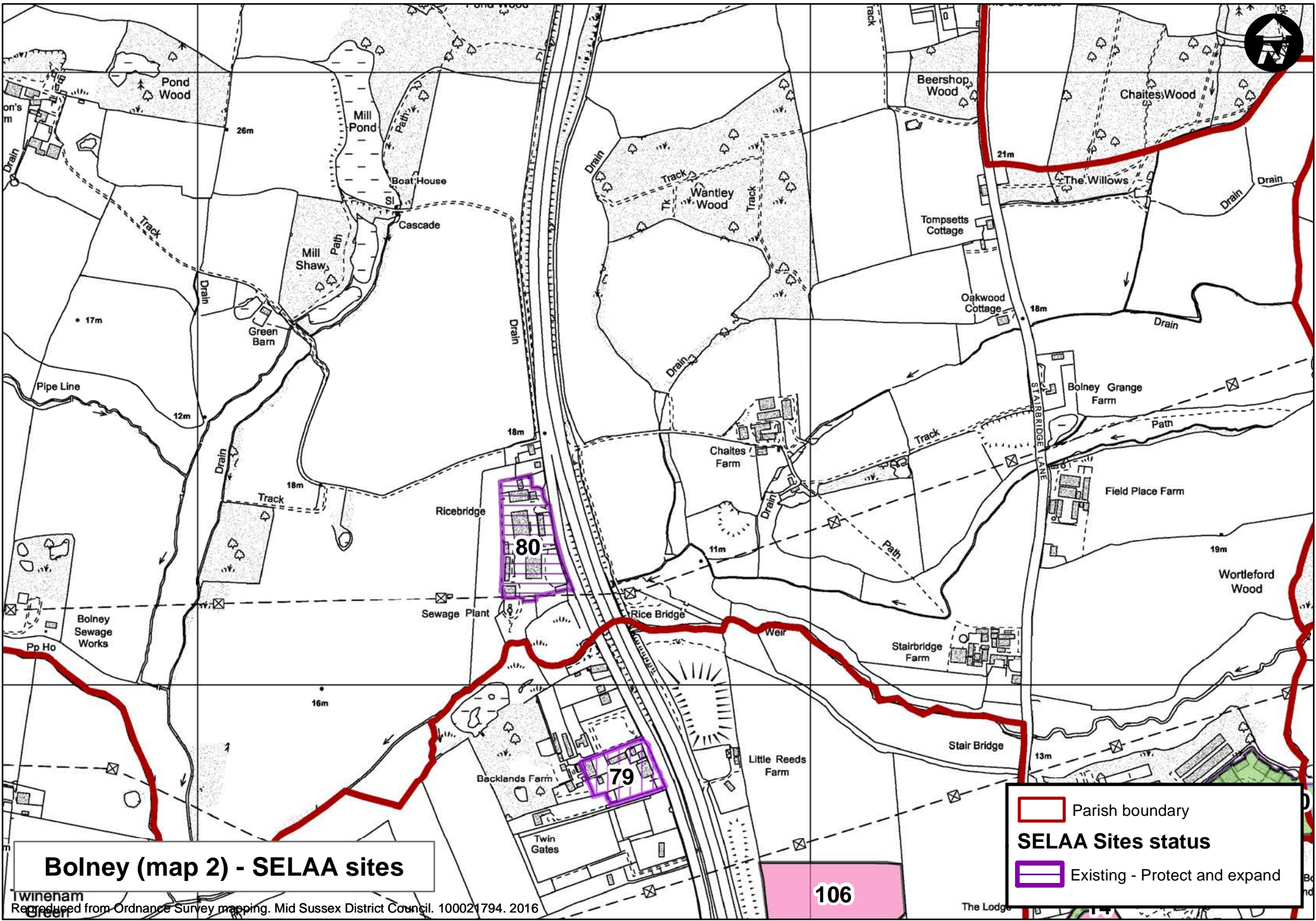
- District boundary
- Existing - Protect

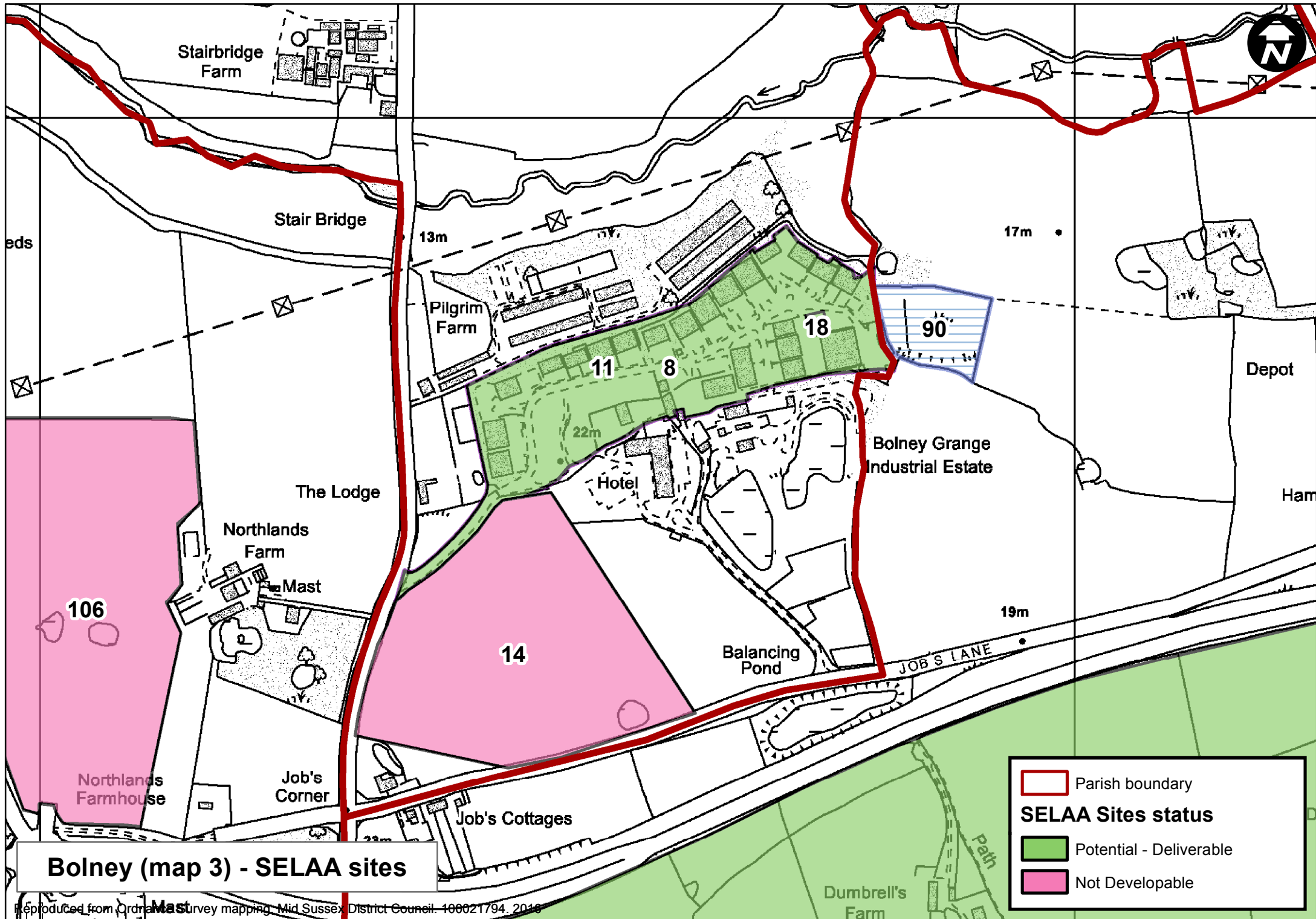


Balcombe (map 1) - SELAA sites

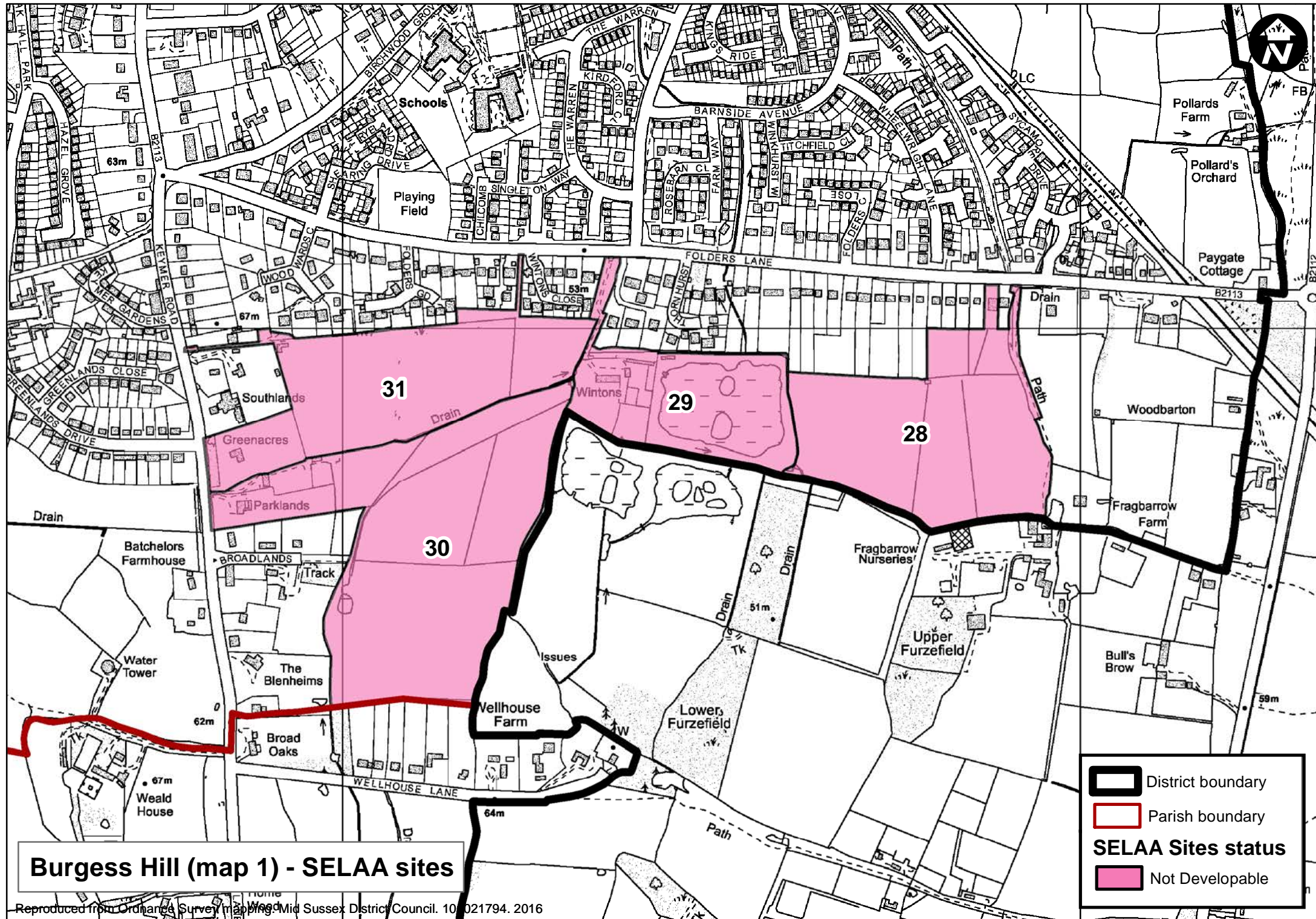


Bolney (map 1) - SELAA sites



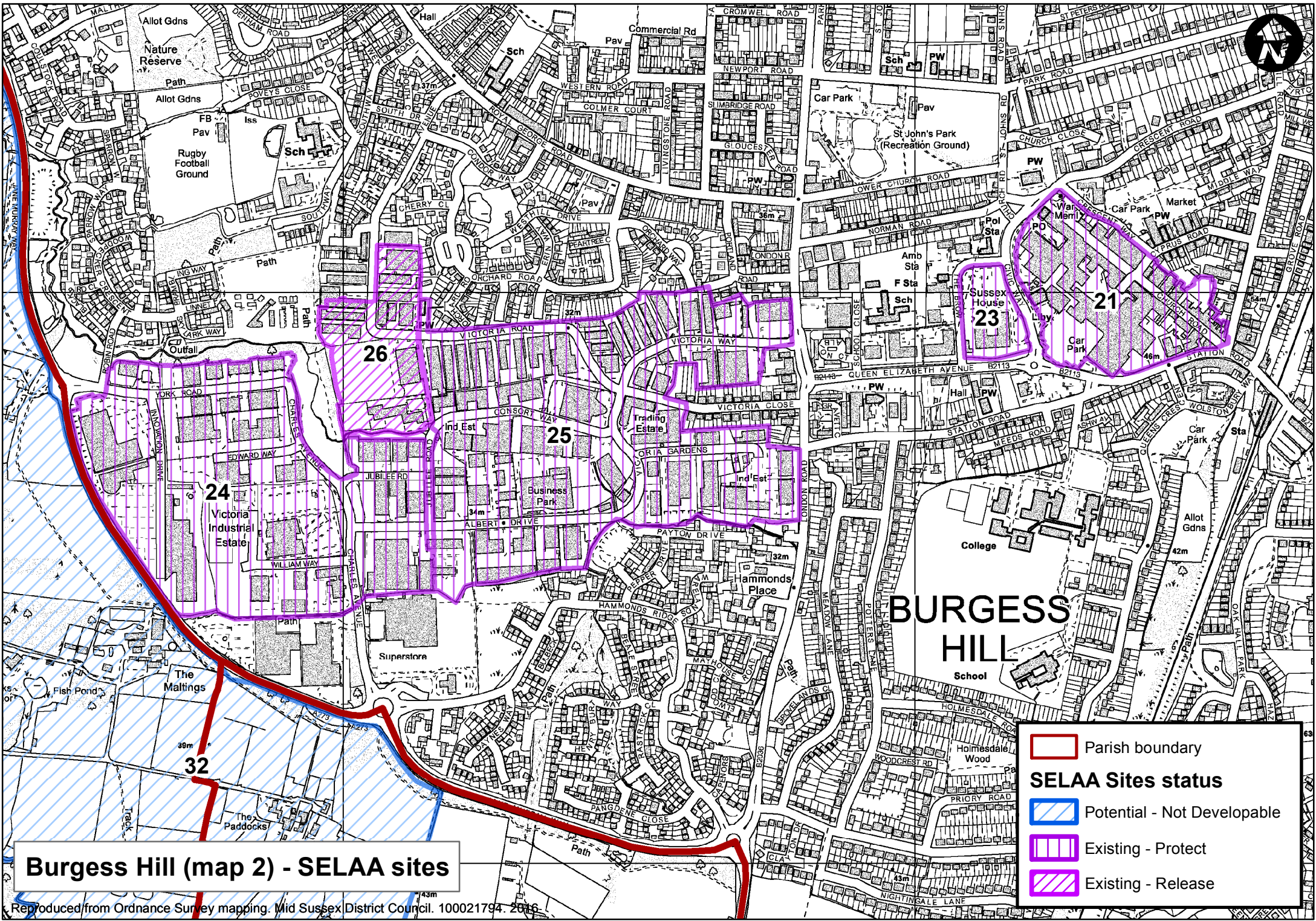


Bolney (map 3) - SELAA sites



Burgess Hill (map 1) - SELAA sites

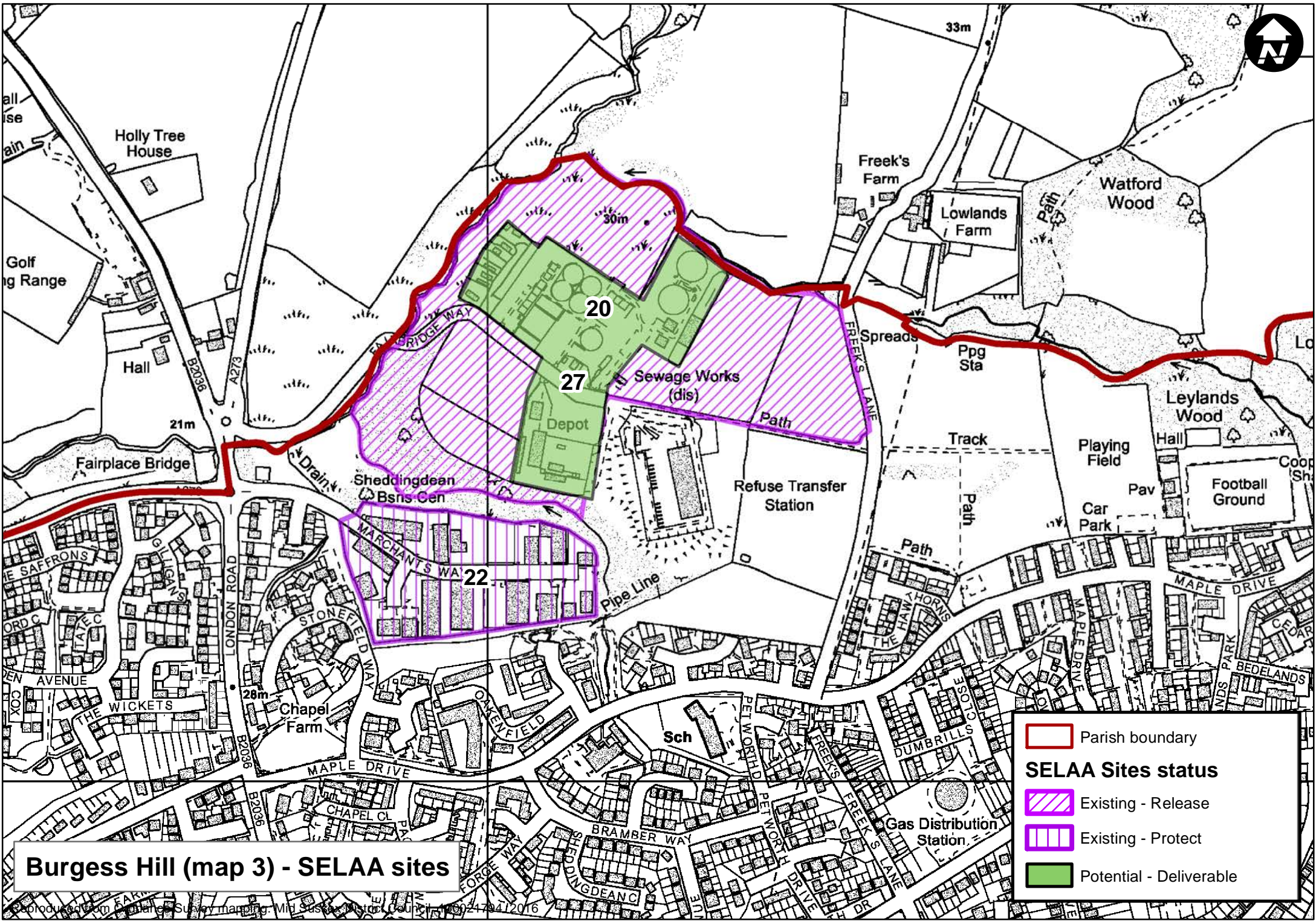
Reproduced from Ordnance Survey map No. Mid Sussex District Council. 10/021794. 2016



Parish boundary
SELAA Sites status
 Potential - Not Developable
 Existing - Protect
 Existing - Release

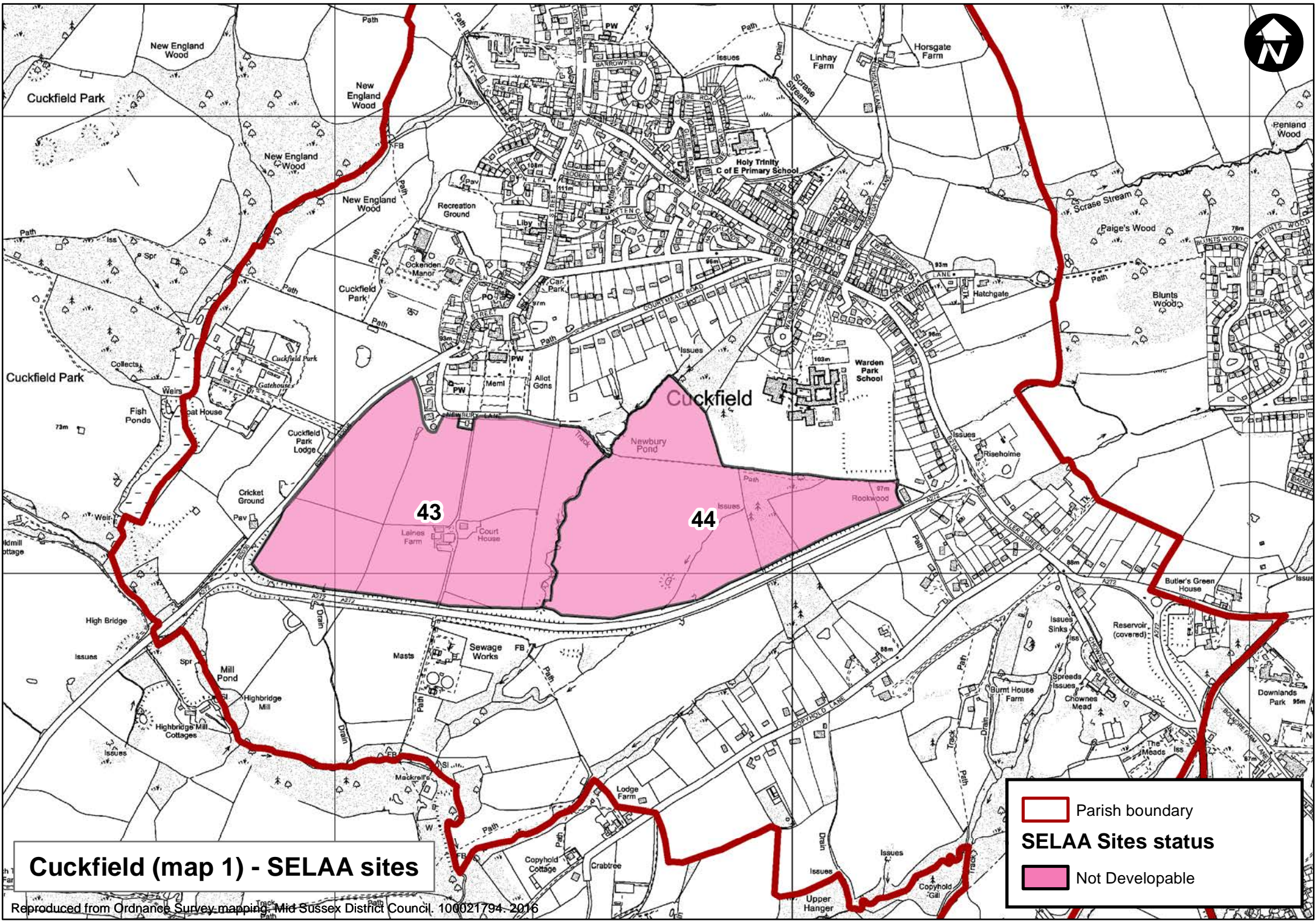
Burgess Hill (map 2) - SELAA sites

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Burgess Hill (map 3) - SELAA sites

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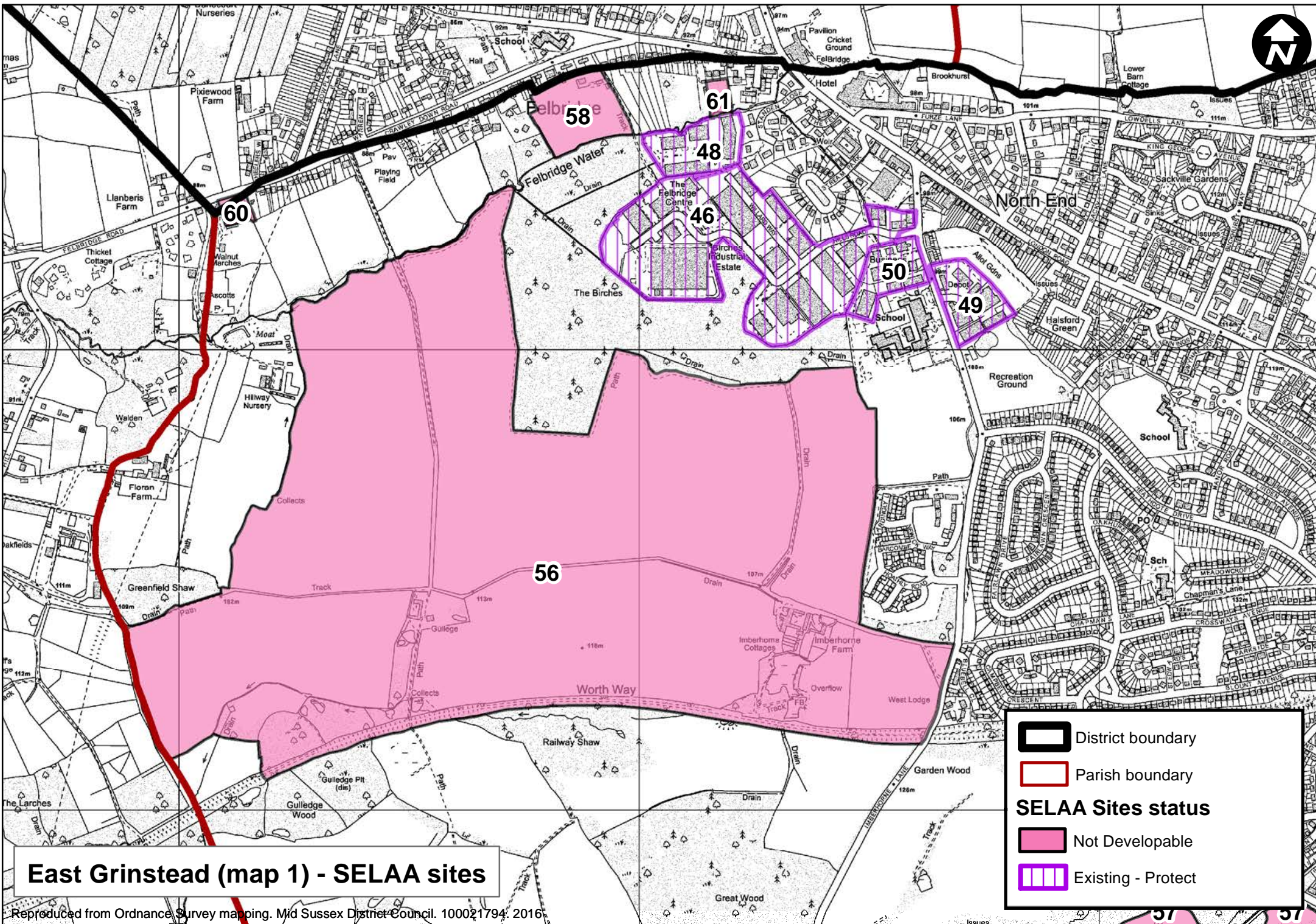


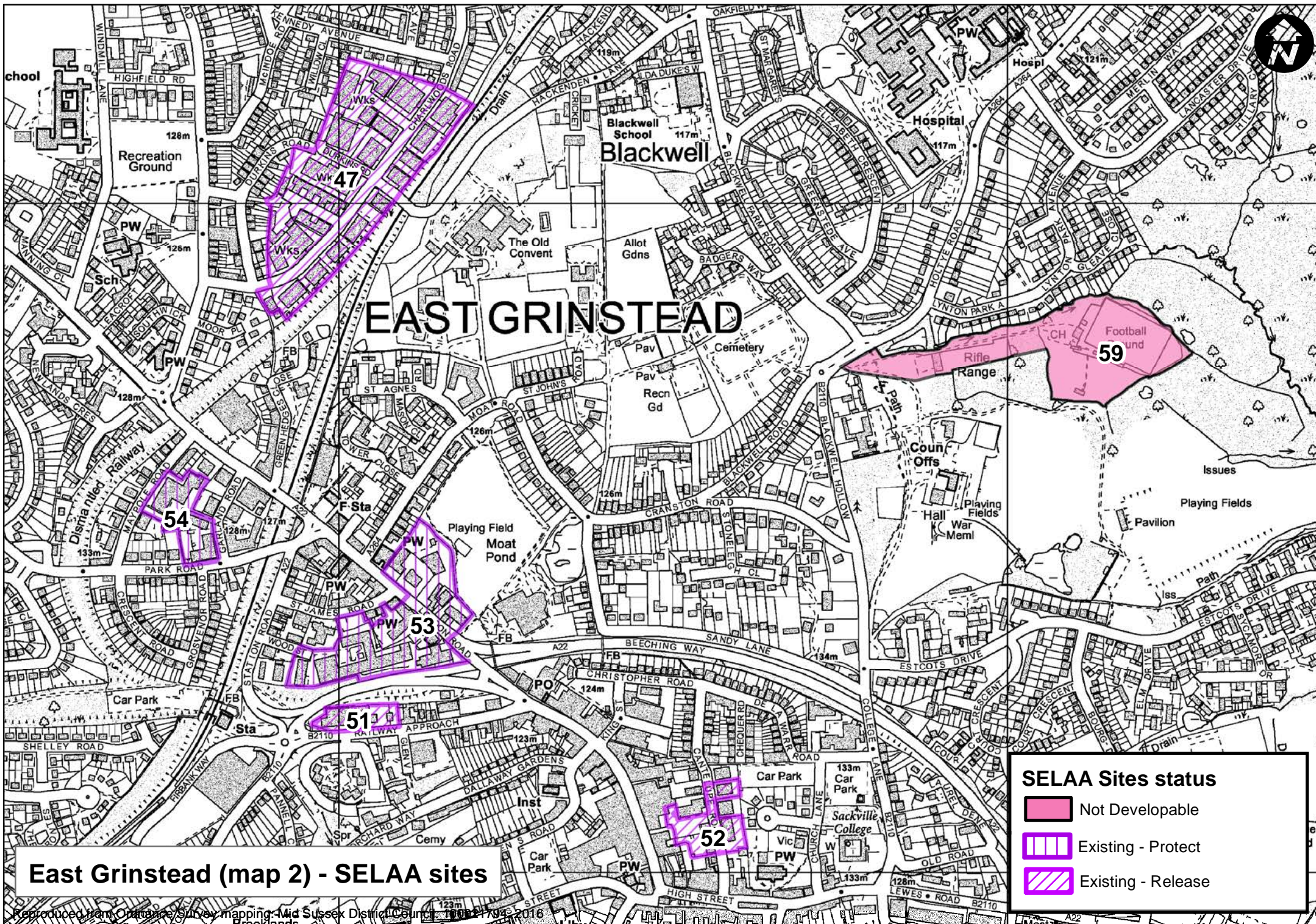
Cuckfield (map 1) - SELAA sites

 Parish boundary

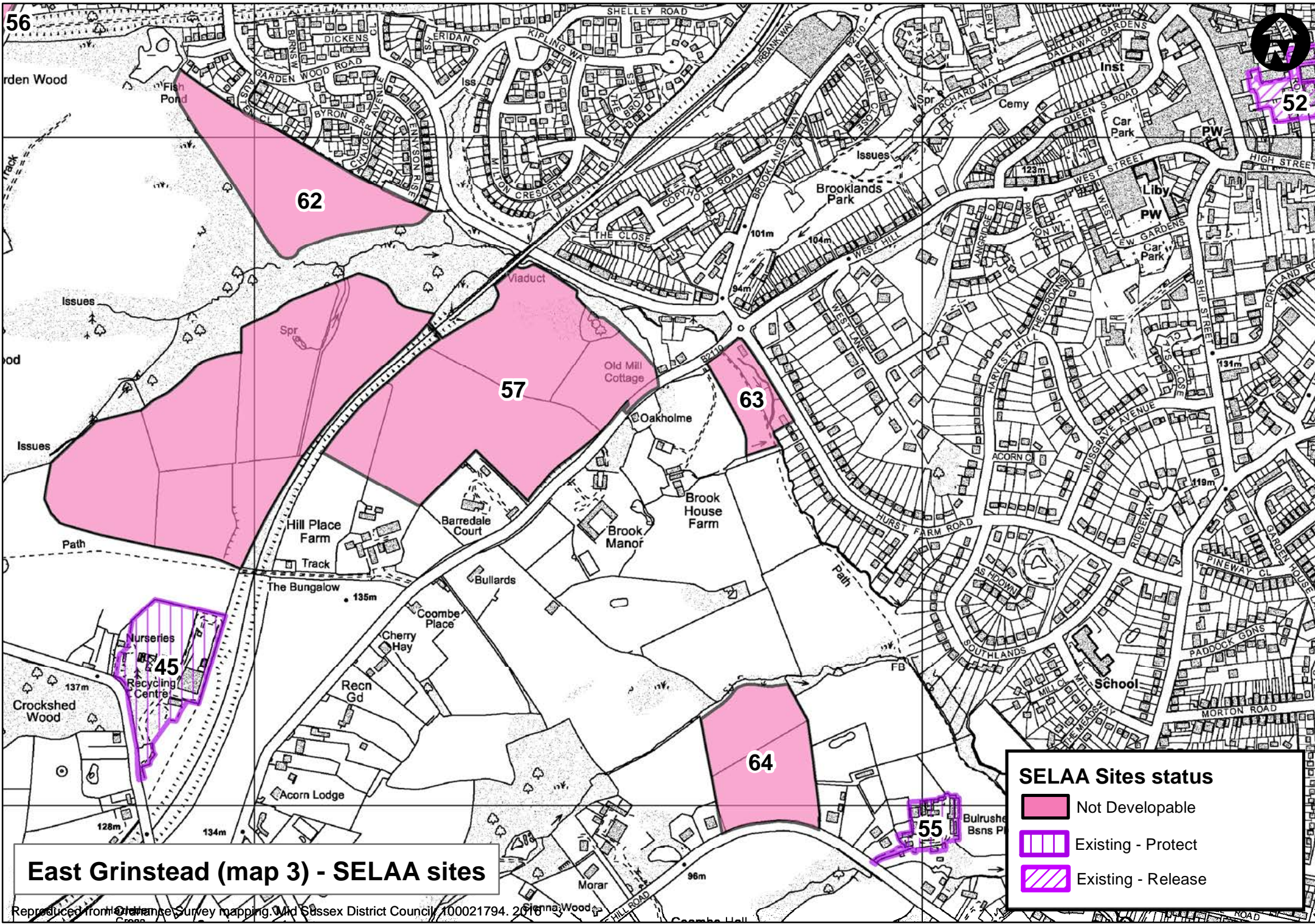
SELAA Sites status

 Not Developable





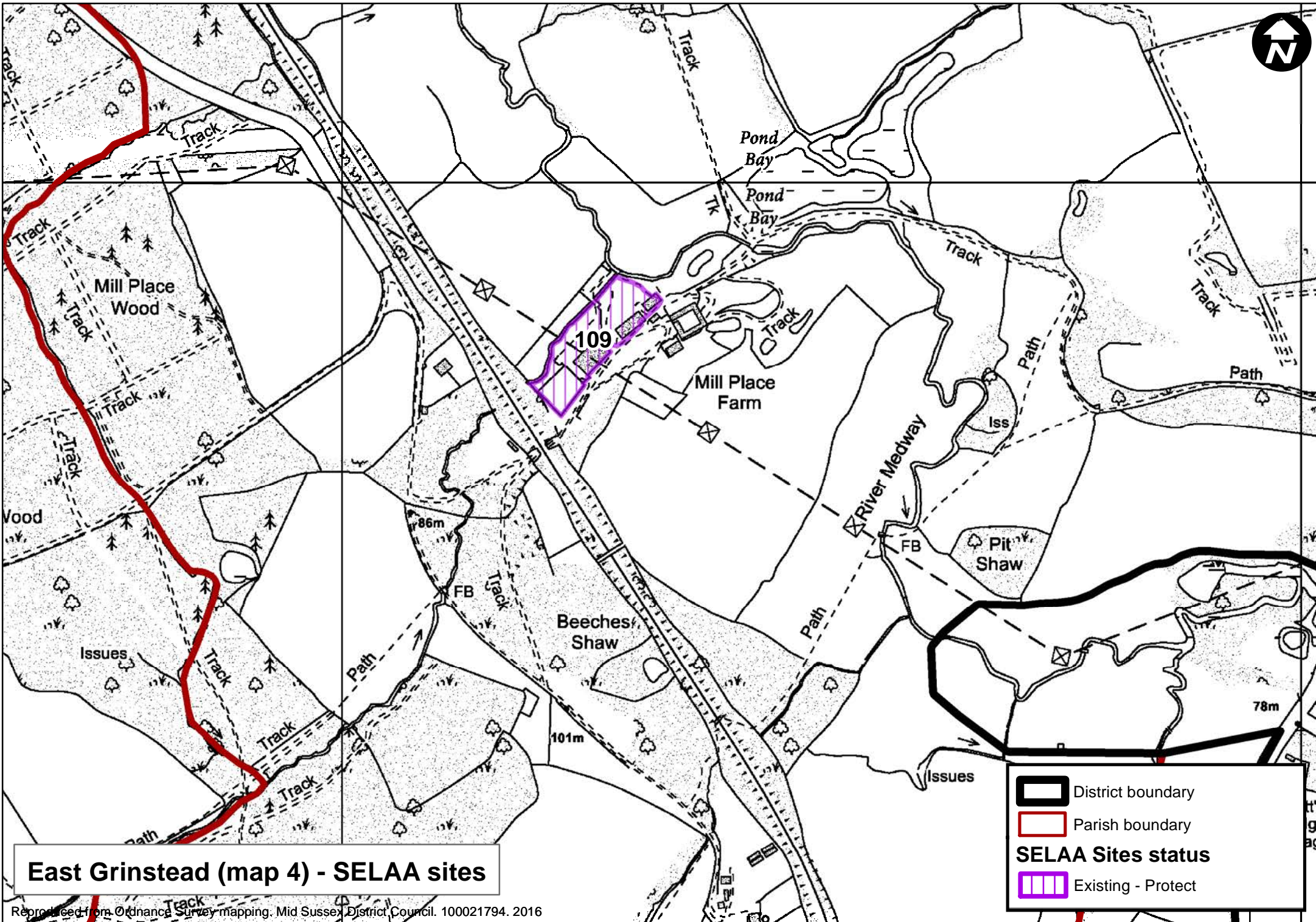
East Grinstead (map 2) - SELAA sites



East Grinstead (map 3) - SELAA sites

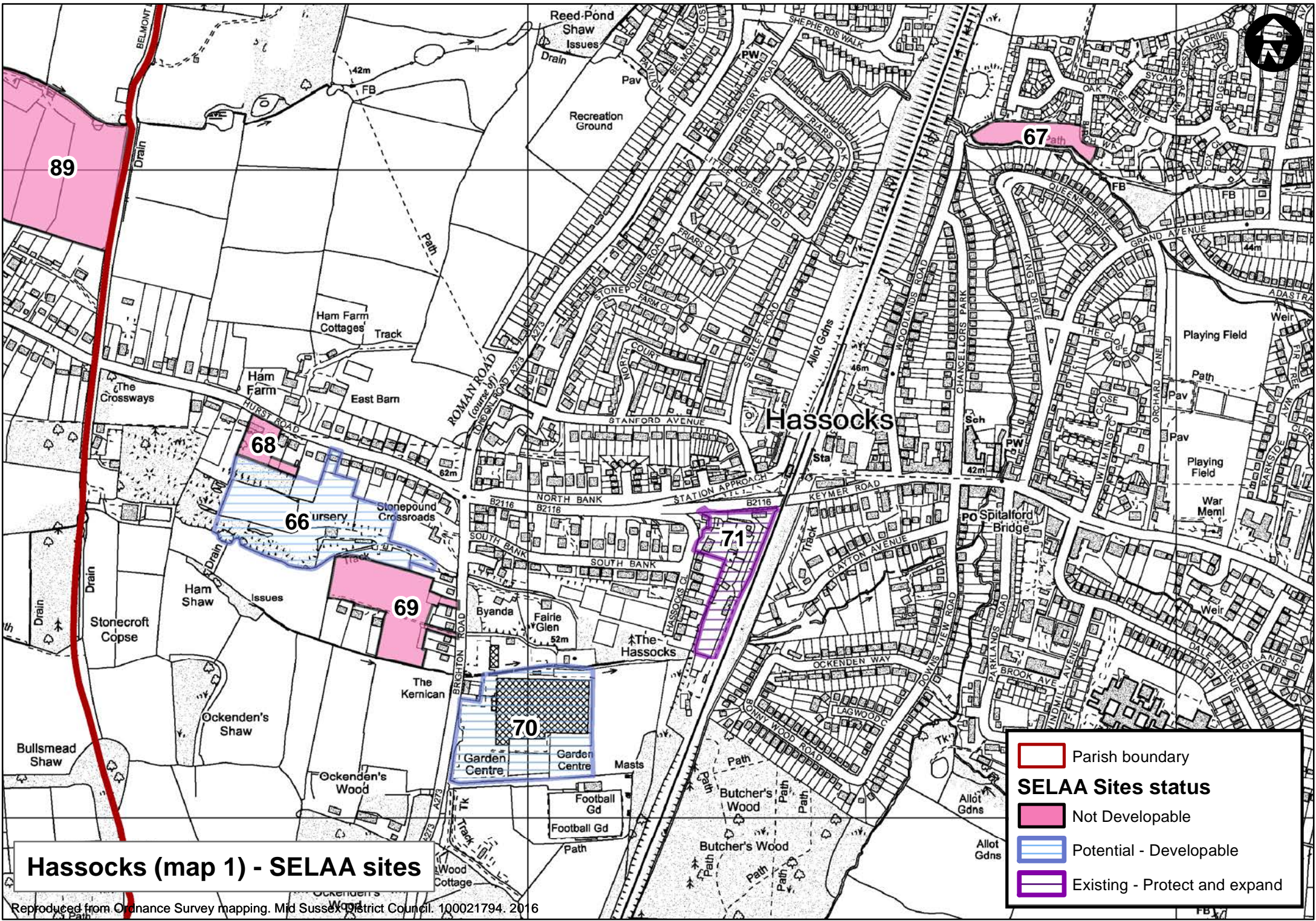
SELAA Sites status

- Not Developable
- Existing - Protect
- Existing - Release



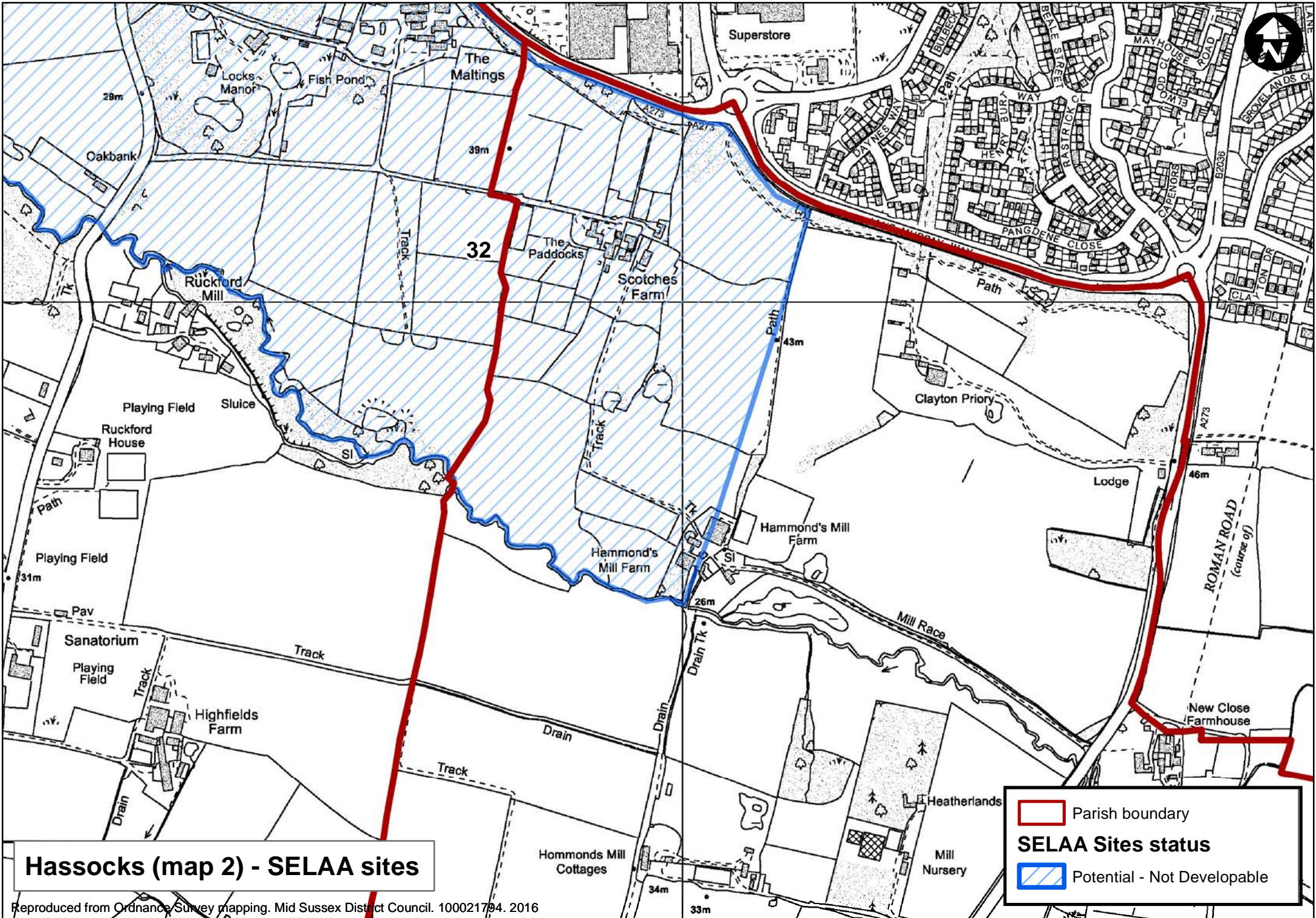
East Grinstead (map 4) - SELAA sites

	District boundary
	Parish boundary
SELAA Sites status	
	Existing - Protect



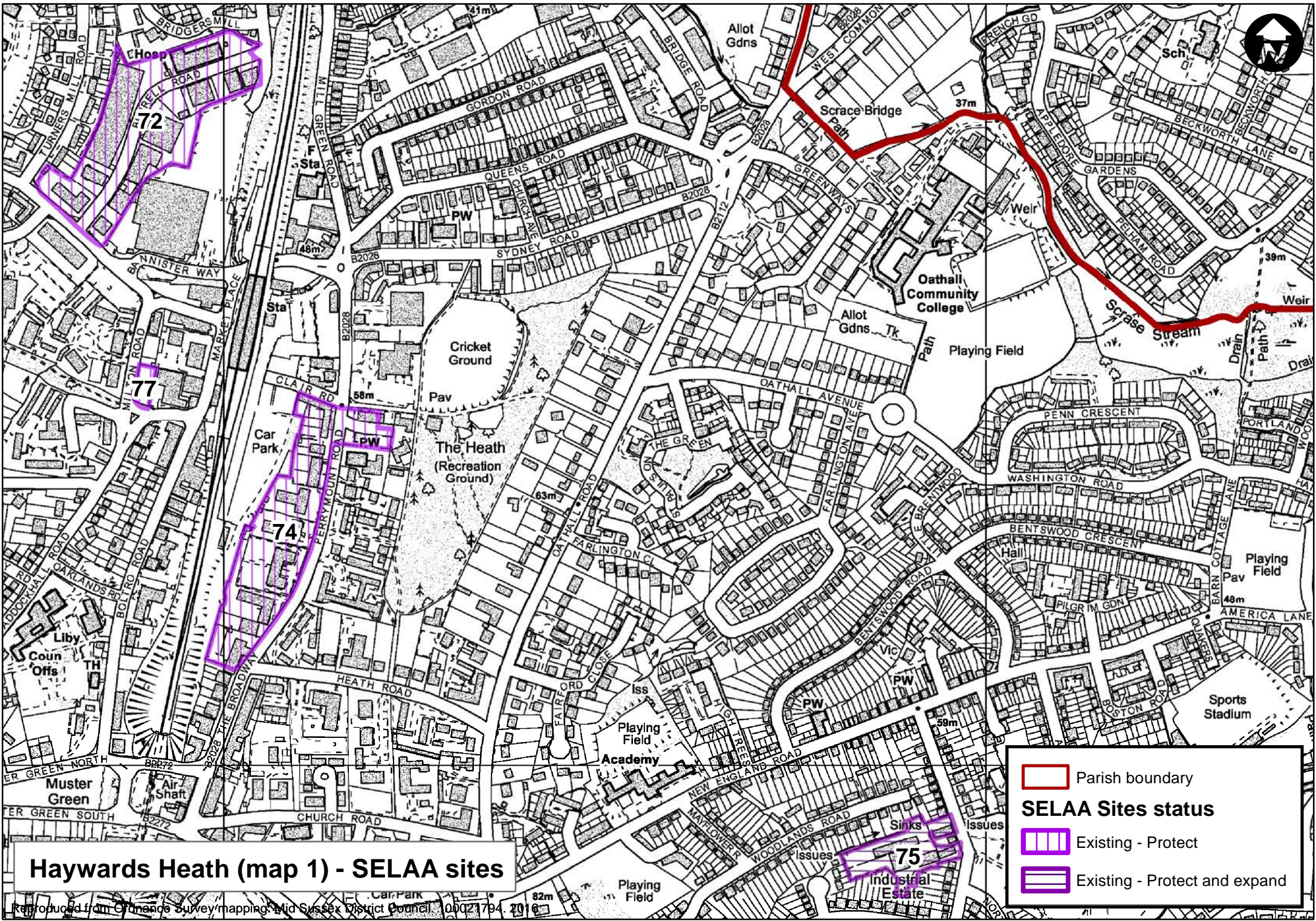
Hassocks (map 1) - SELAA sites

	Parish boundary
SELAA Sites status	
	Not Developable
	Potential - Developable
	Existing - Protect and expand

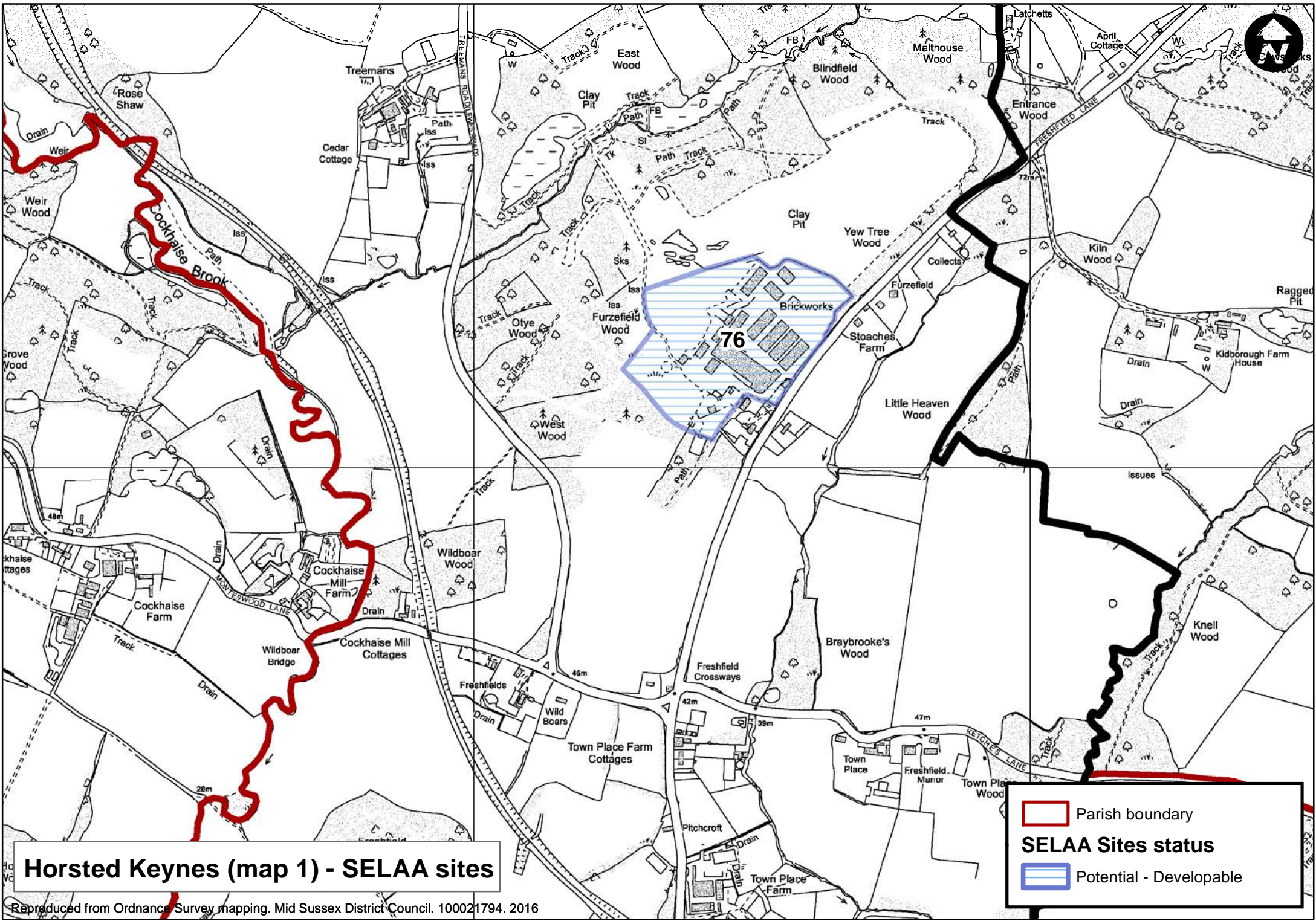


Hassocks (map 2) - SELAA sites

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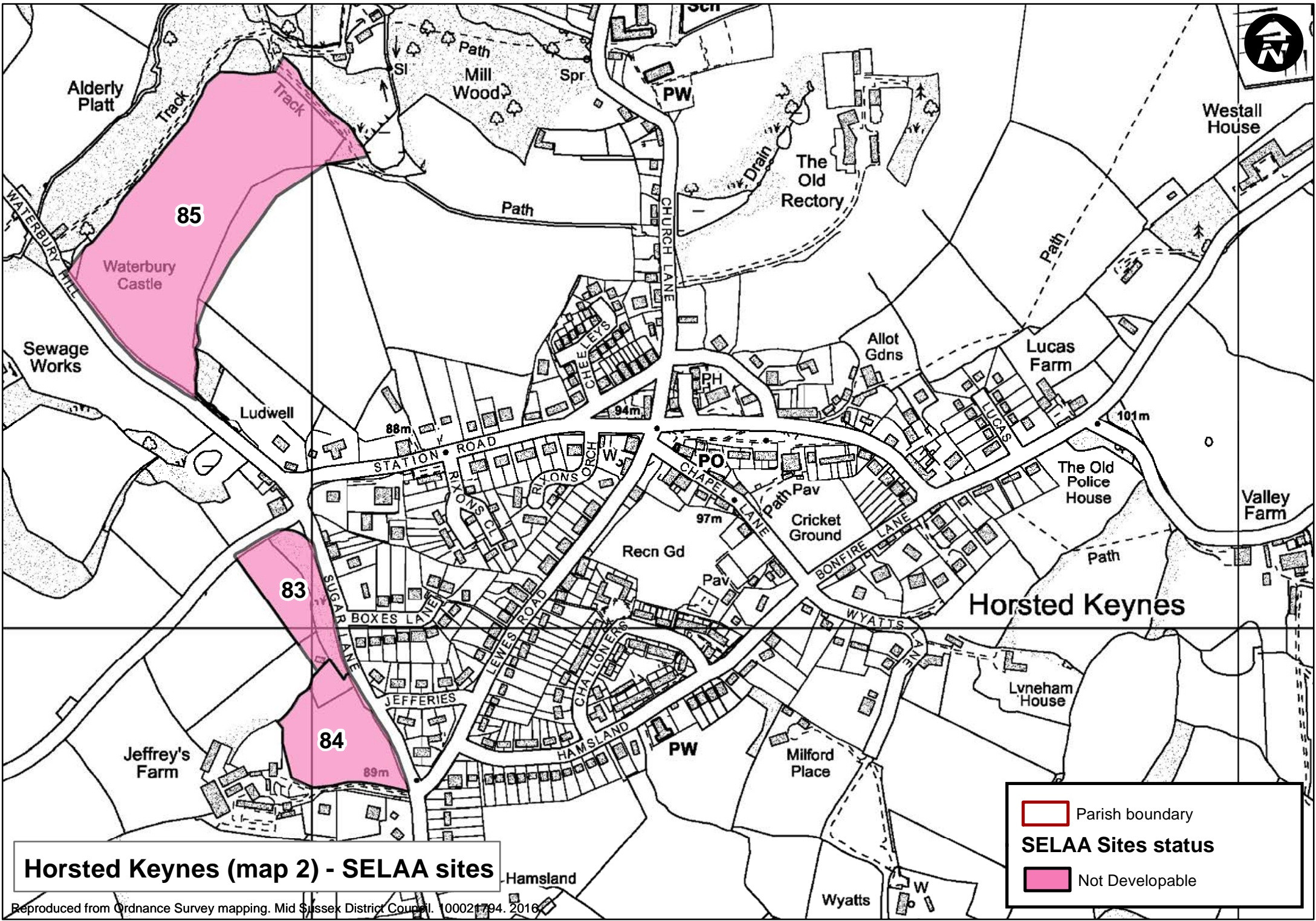


Haywards Heath (map 1) - SELAA sites



Horsted Keynes (map 1) - SELAA sites

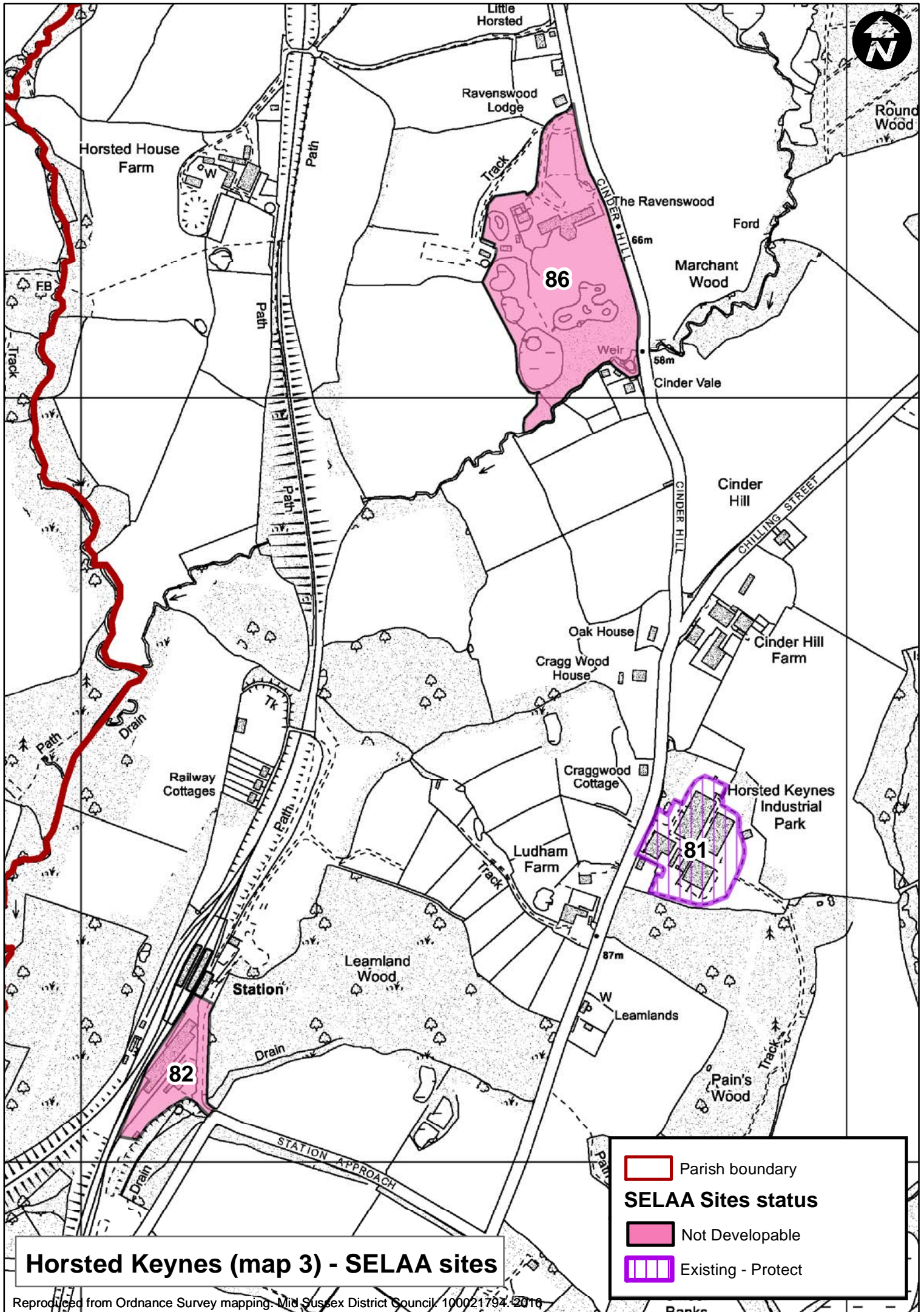
Parish boundary
SELAA Sites status
 Potential - Developable






Horsted Keynes (map 2) - SELAA sites

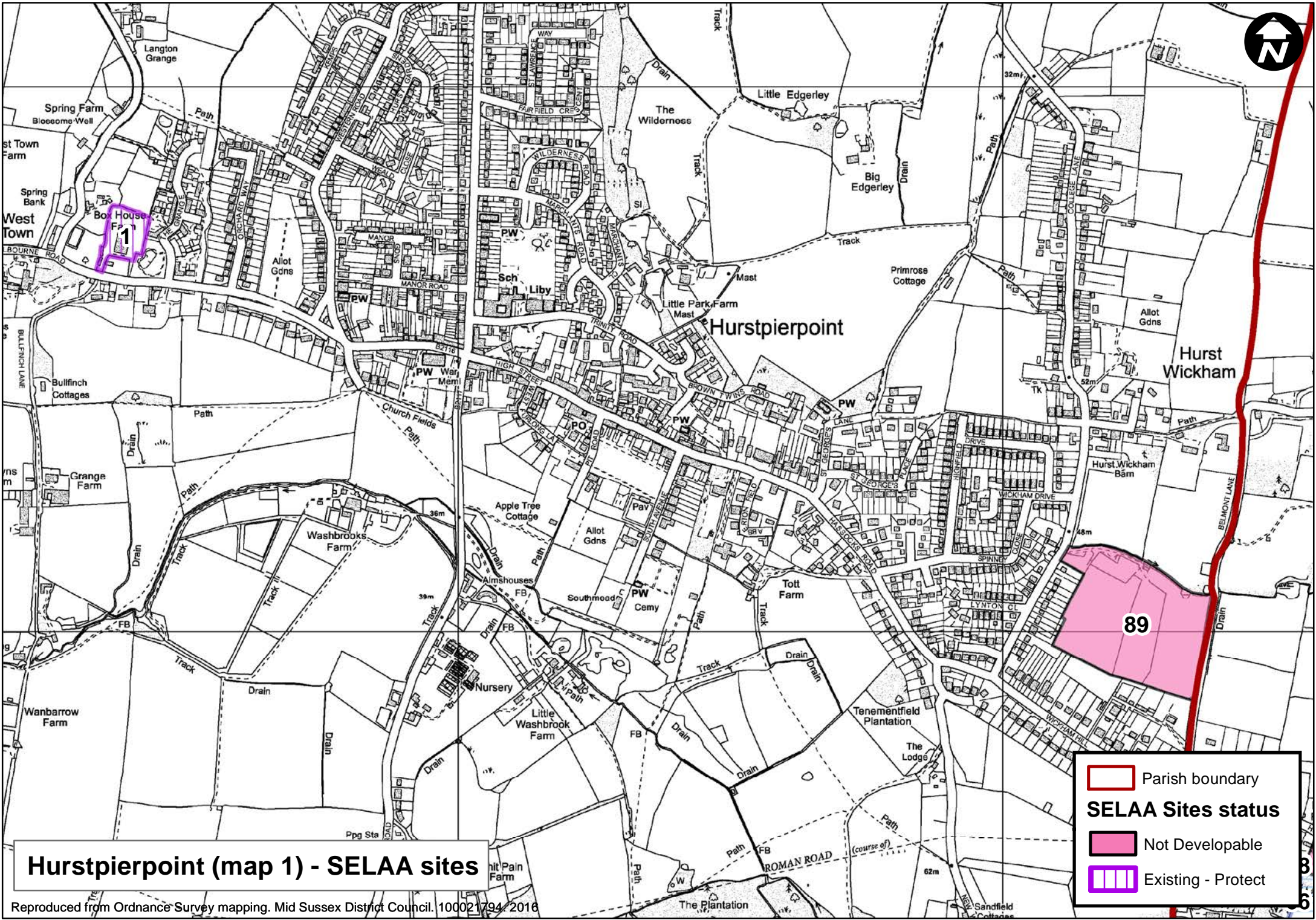
	Parish boundary
SELAA Sites status	
	Not Developable

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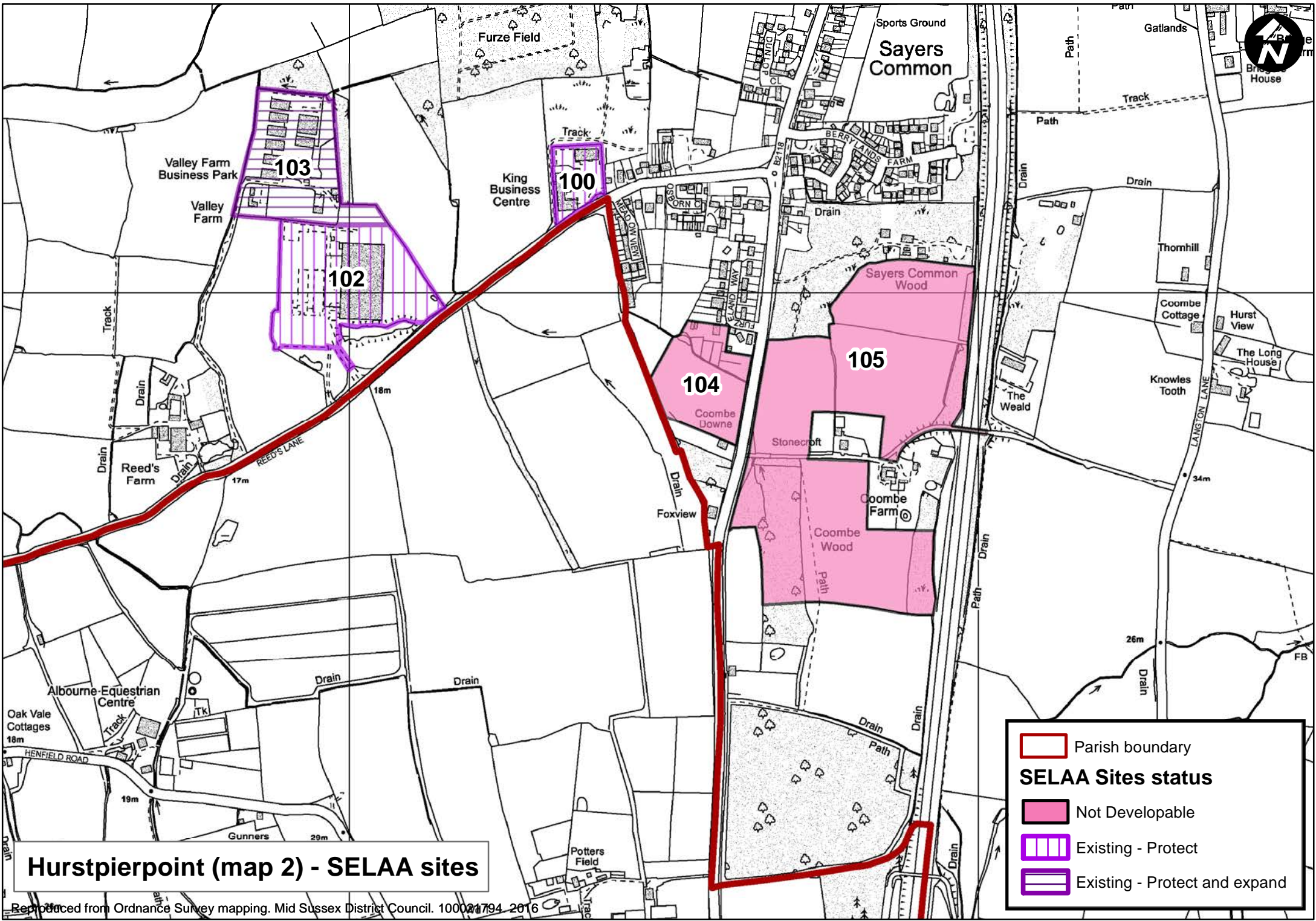
Horsted Keynes (map 3) - SELAA sites

	Parish boundary
SELAA Sites status	
	Not Developable
	Existing - Protect







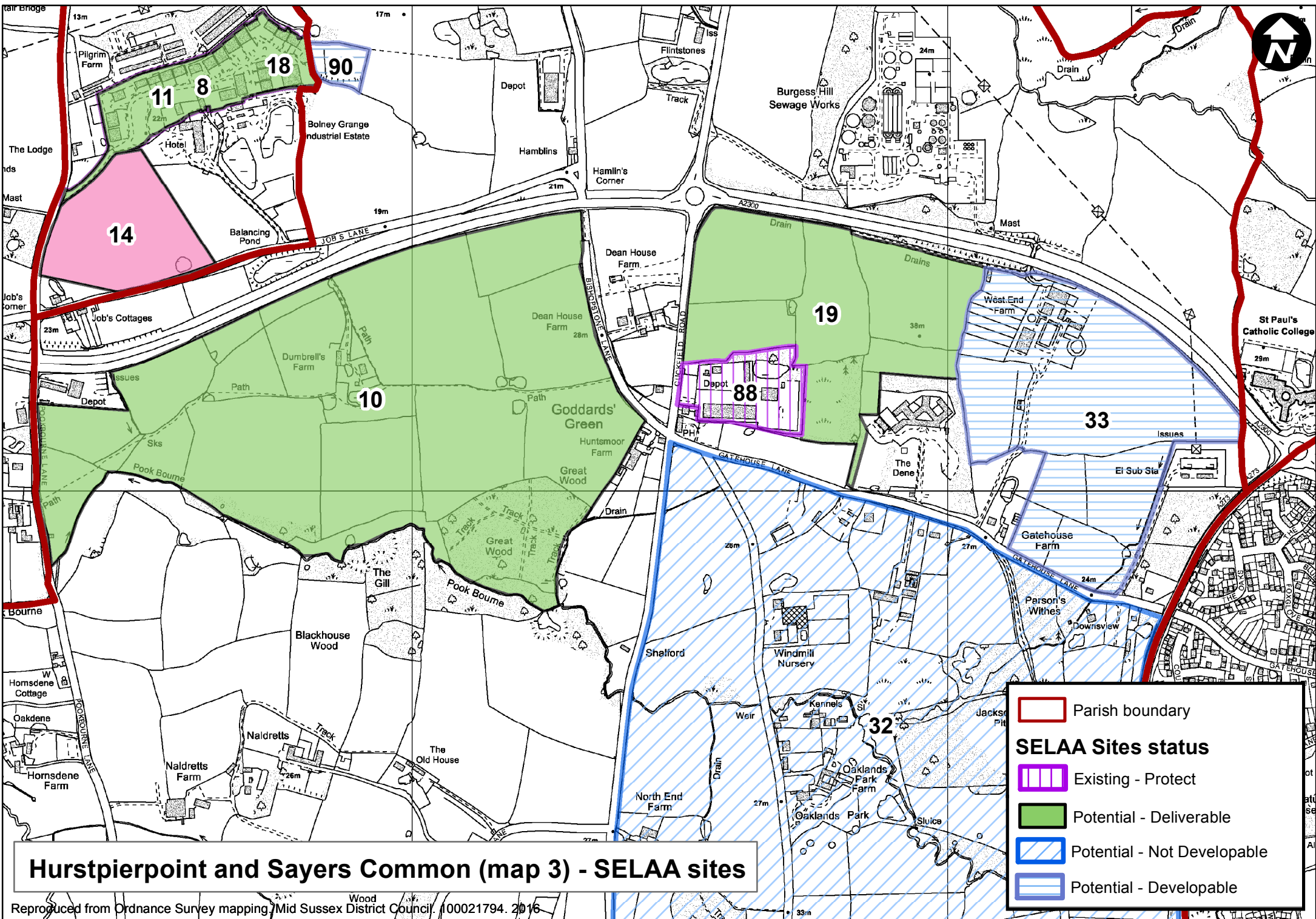
Hurstpierpoint (map 1) - SELAA sites

	Parish boundary
SELAA Sites status	
	Not Developable
	Existing - Protect



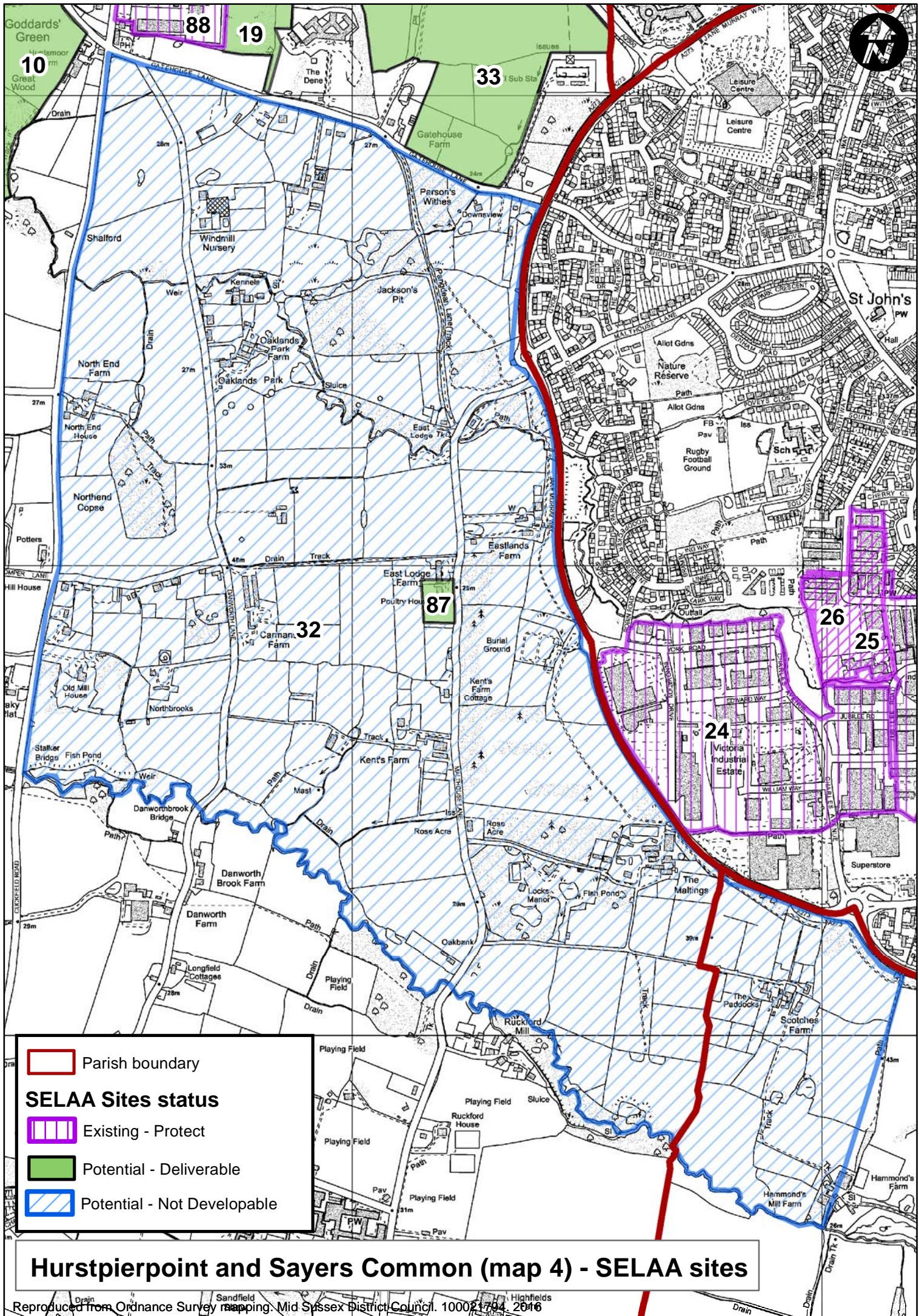
Hurstpierpoint (map 2) - SELAA sites

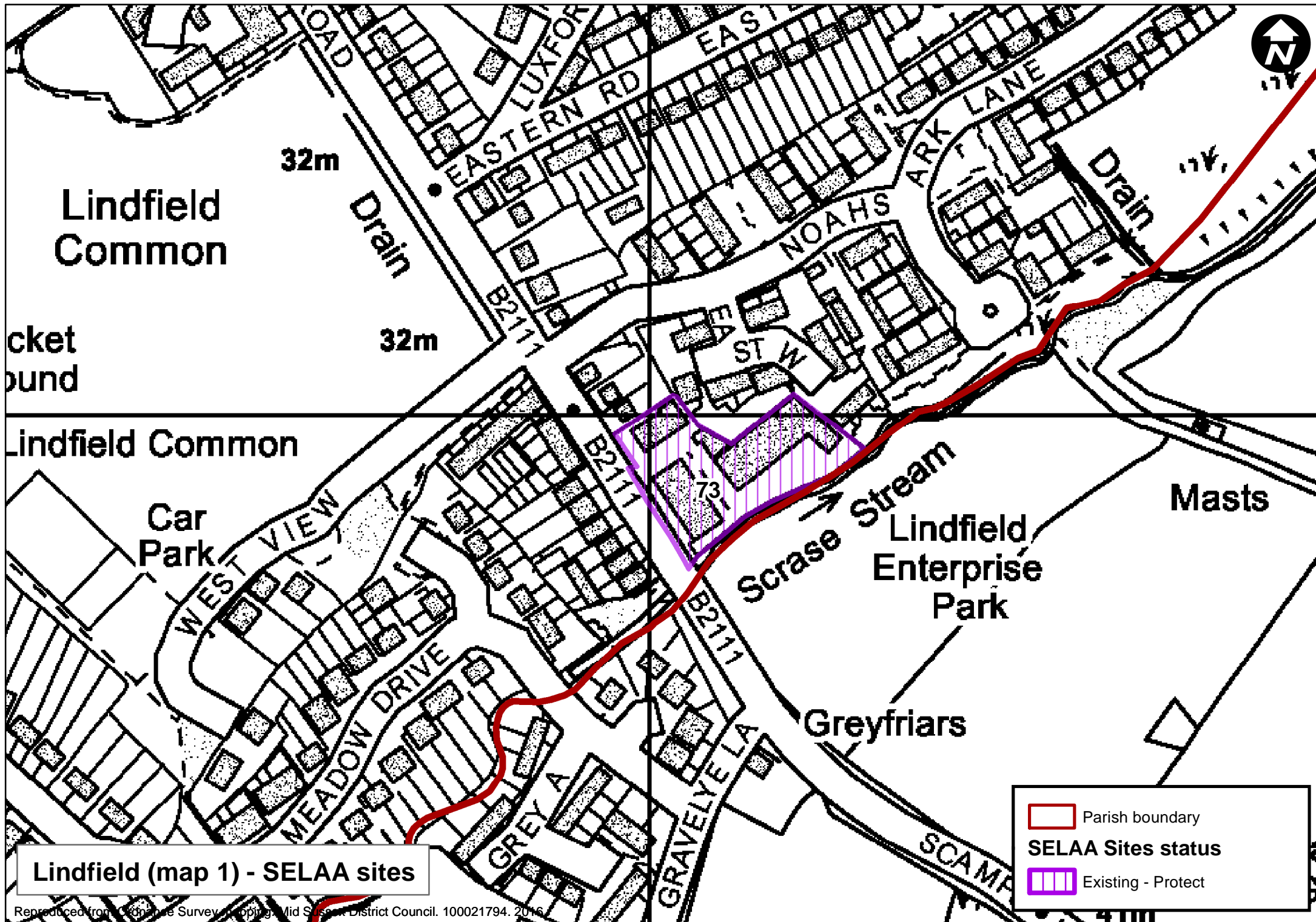
	Parish boundary
SELAA Sites status	
	Not Developable
	Existing - Protect
	Existing - Protect and expand

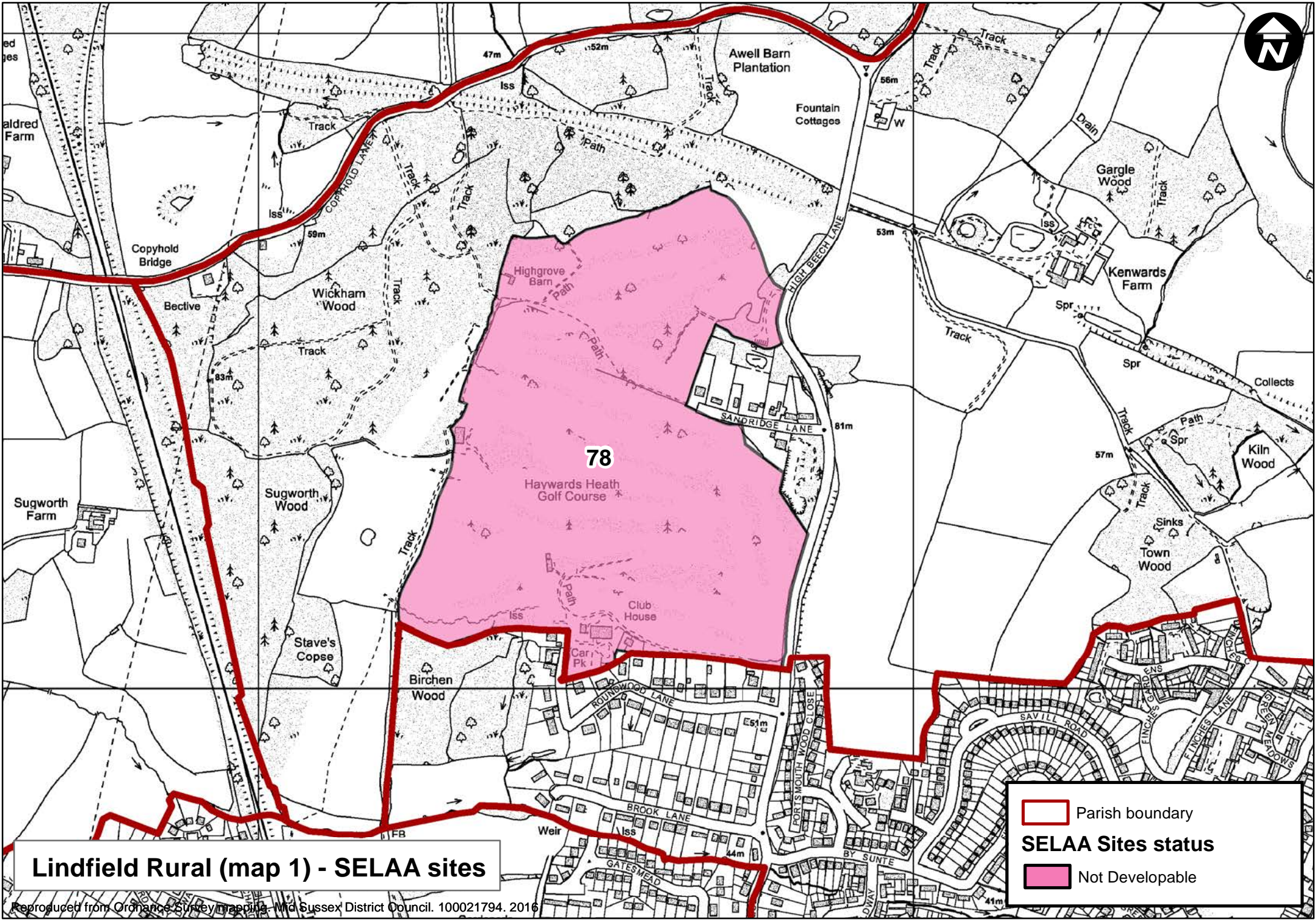


Hurstpierpoint and Sayers Common (map 3) - SELAA sites

	Parish boundary
SELAA Sites status	
	Existing - Protect
	Potential - Deliverable
	Potential - Not Developable
	Potential - Developable

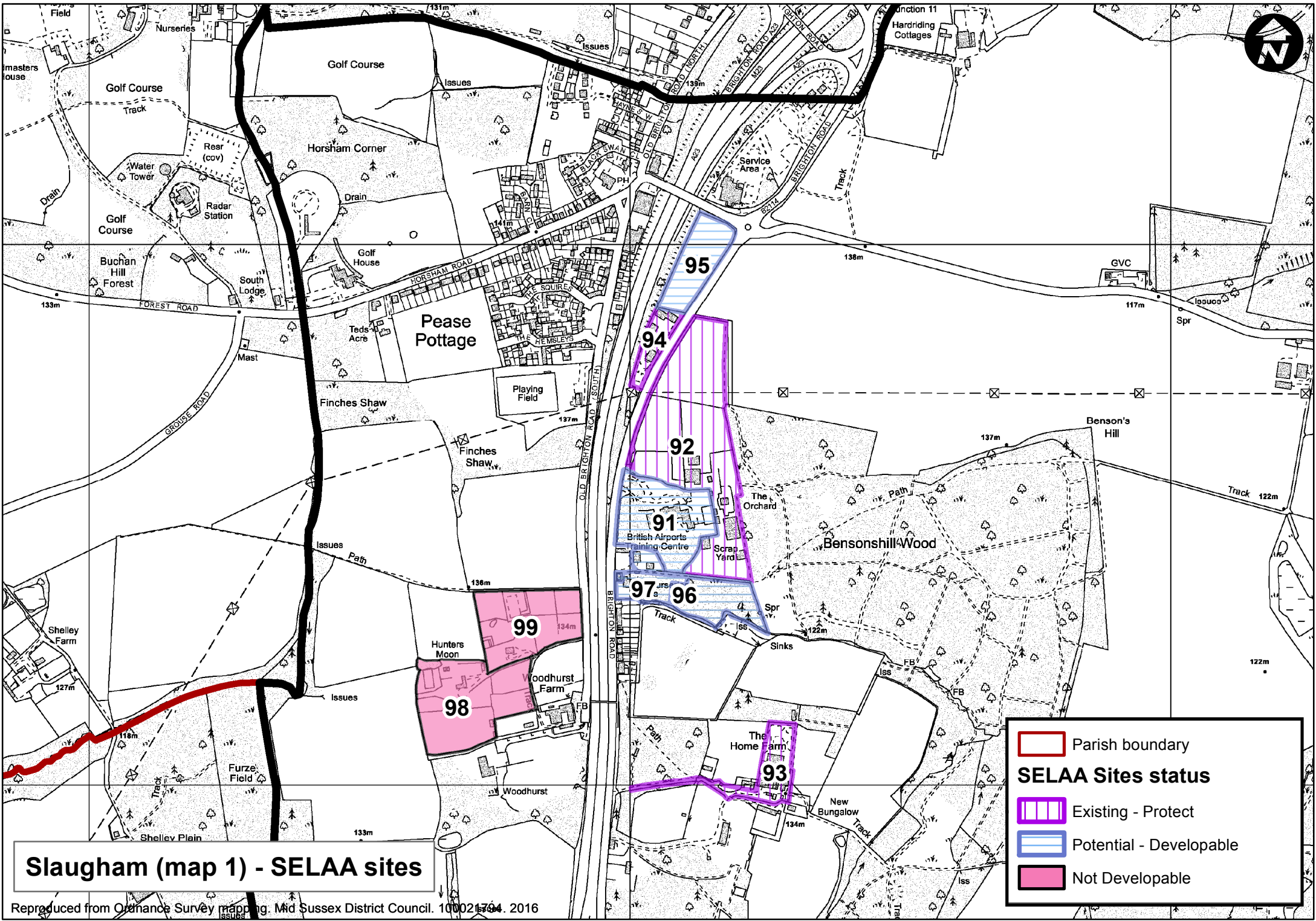






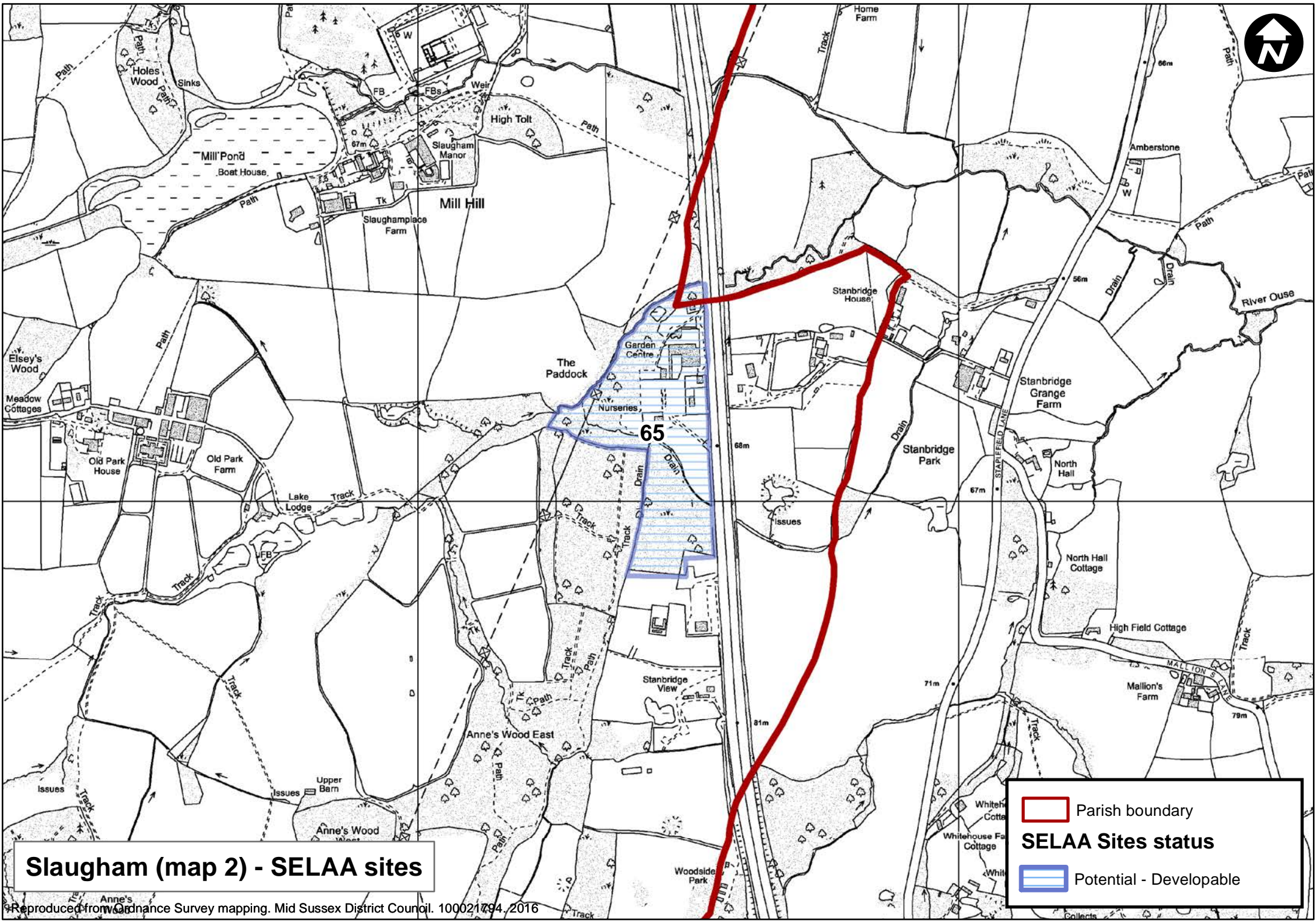
Lindfield Rural (map 1) - SELAA sites

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Slaughtam (map 1) - SELAA sites

Parish boundary
SELAA Sites status
 Existing - Protect
 Potential - Developable
 Not Developable

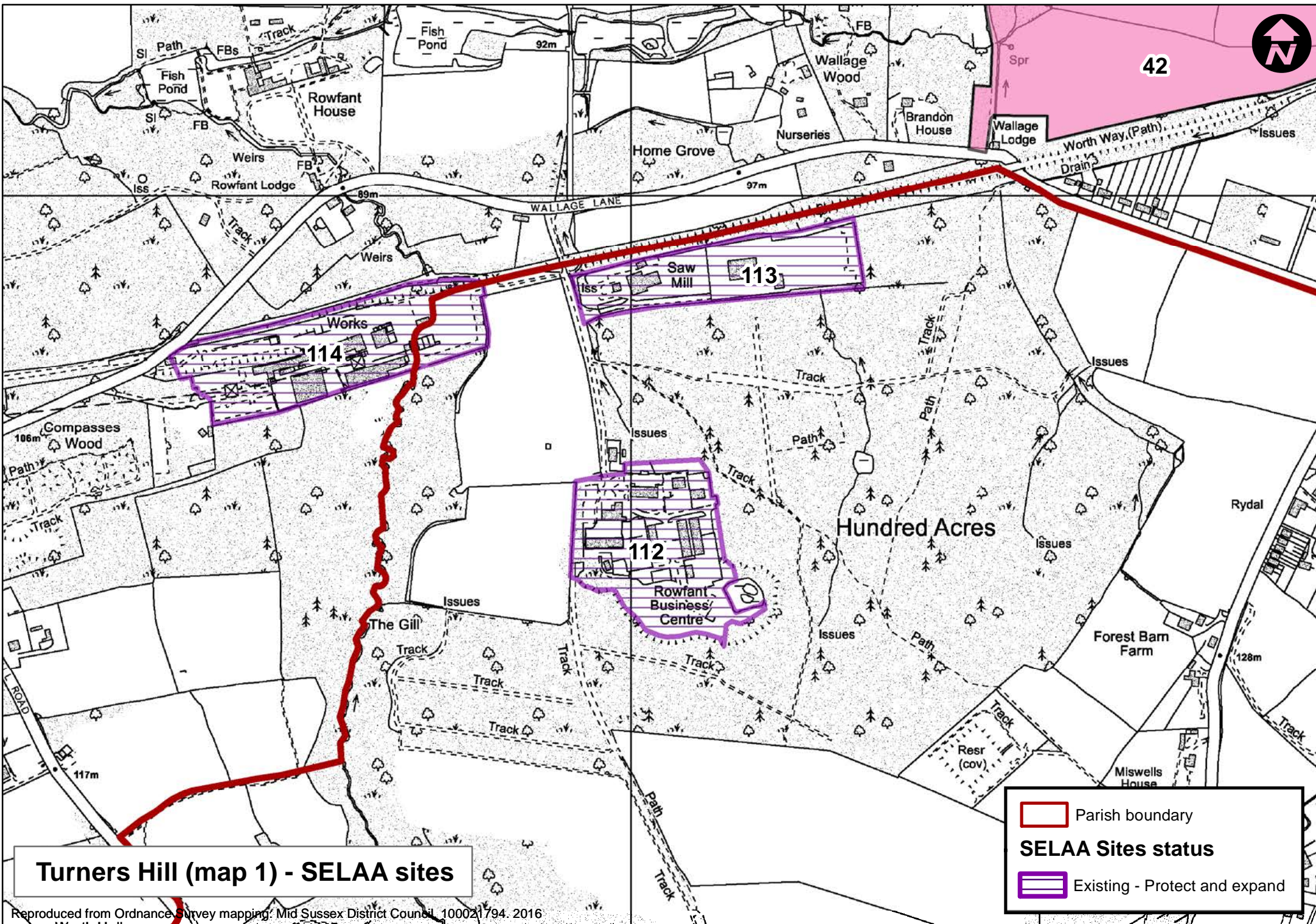


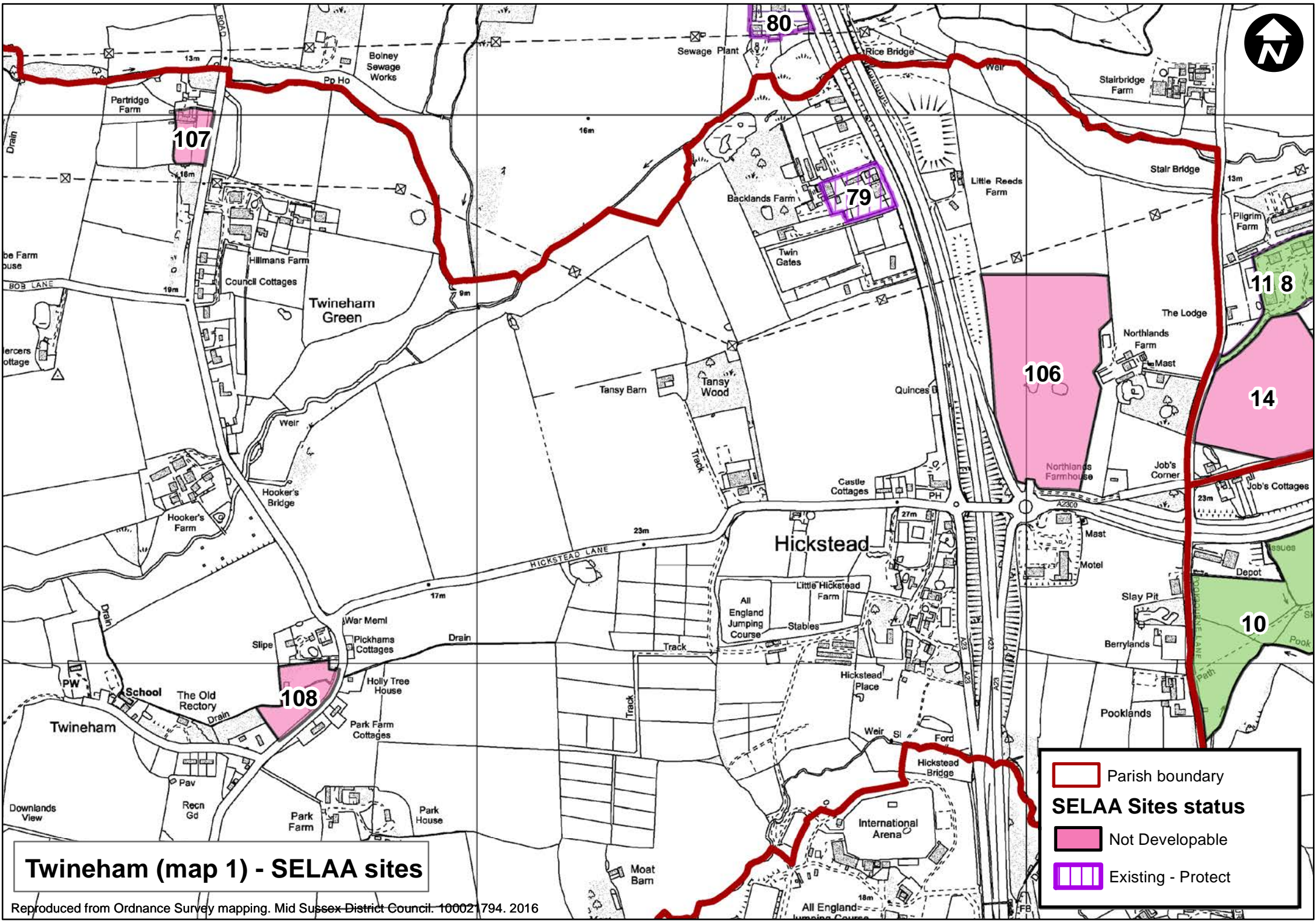
Slaugham (map 2) - SELAA sites

 Parish boundary

SELAA Sites status

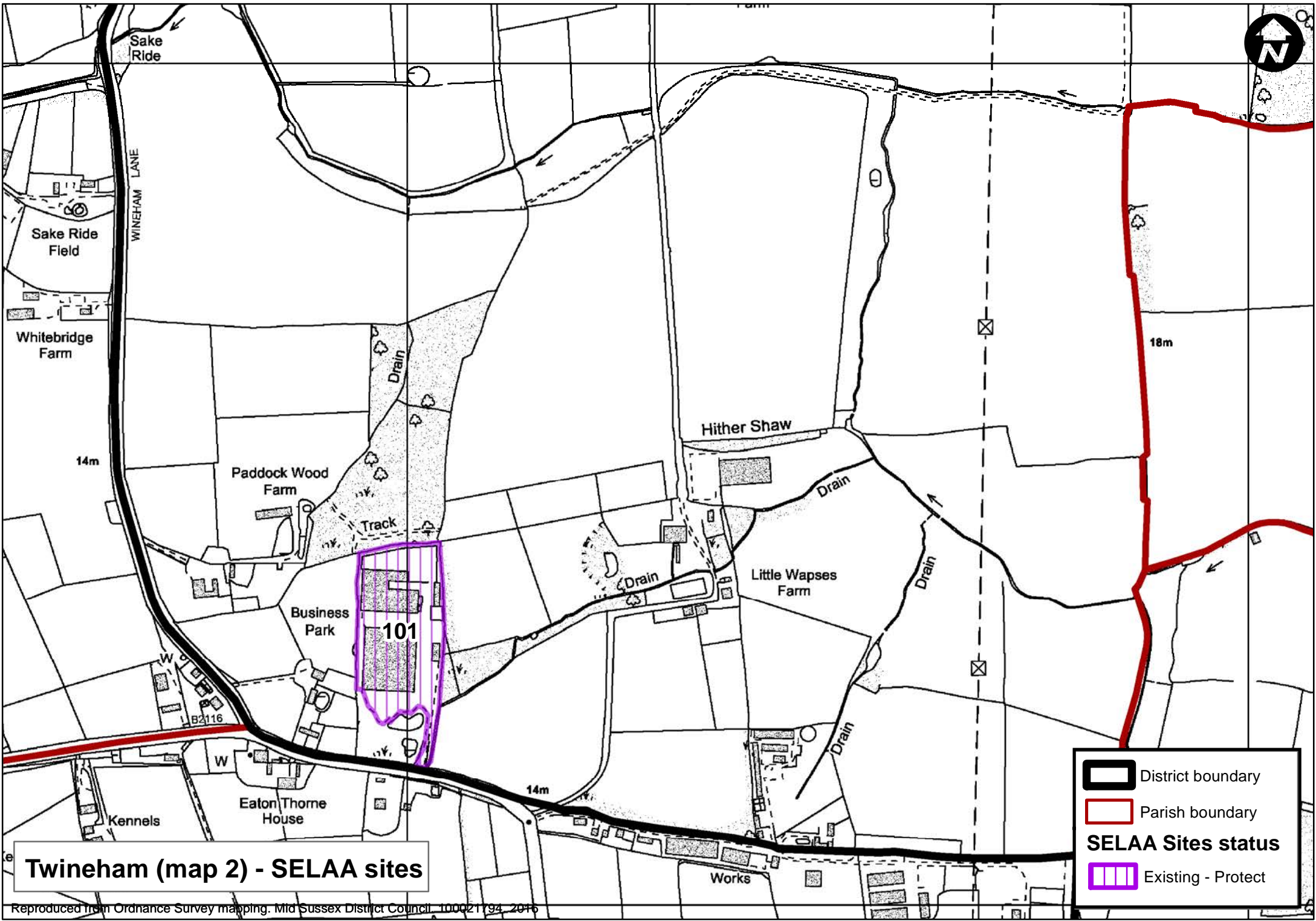
 Potential - Developable

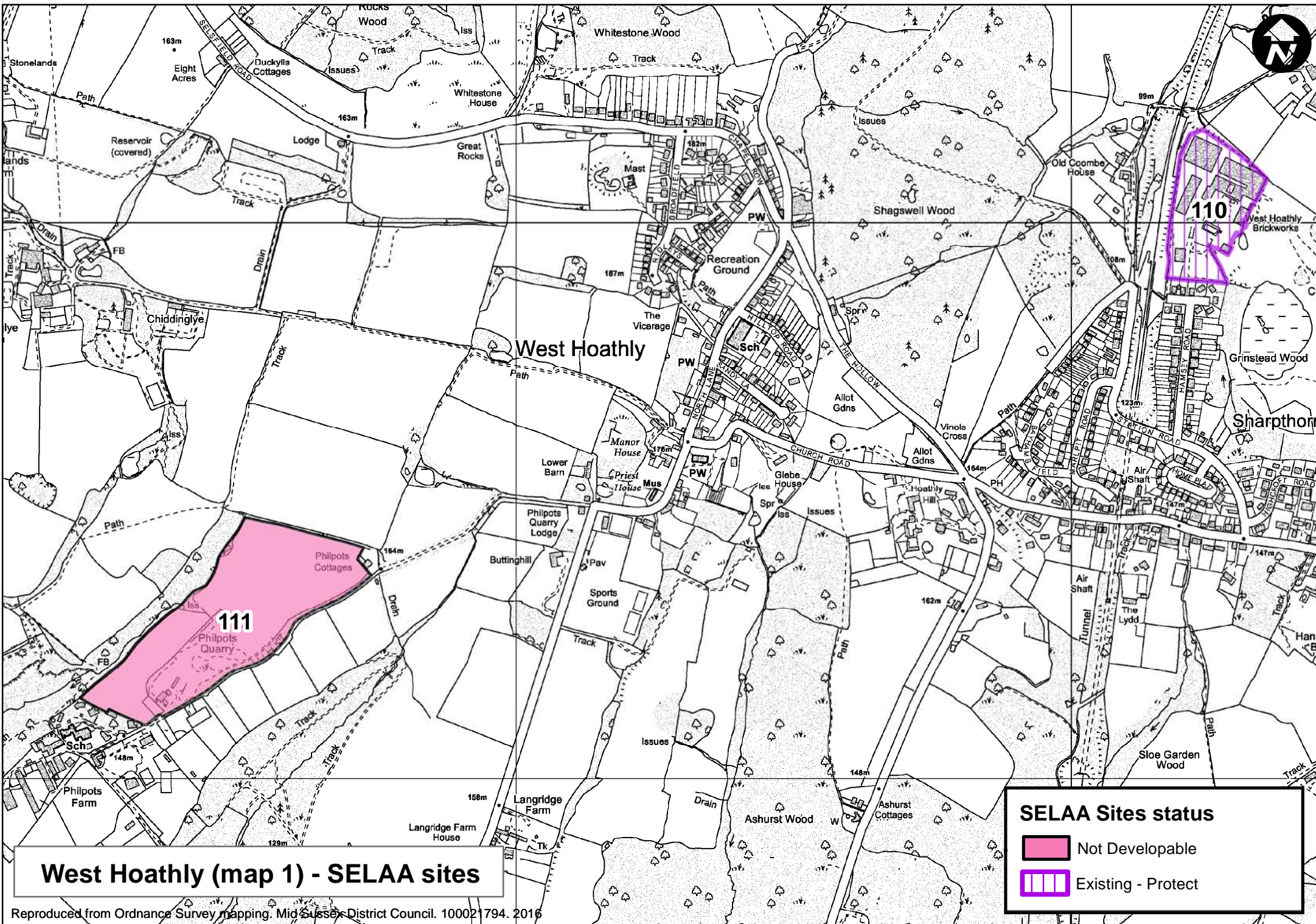




Twineham (map 1) - SELAA sites

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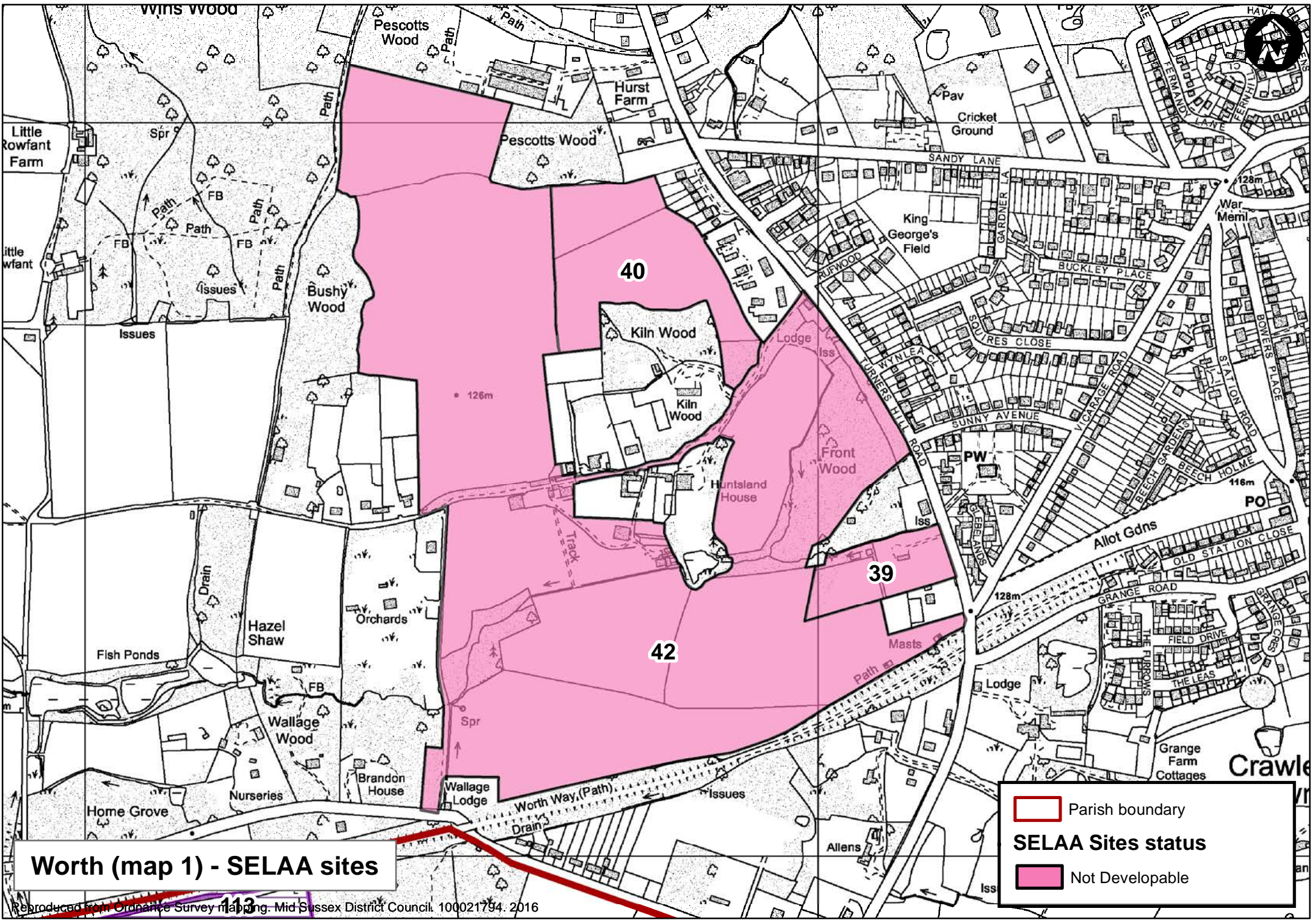


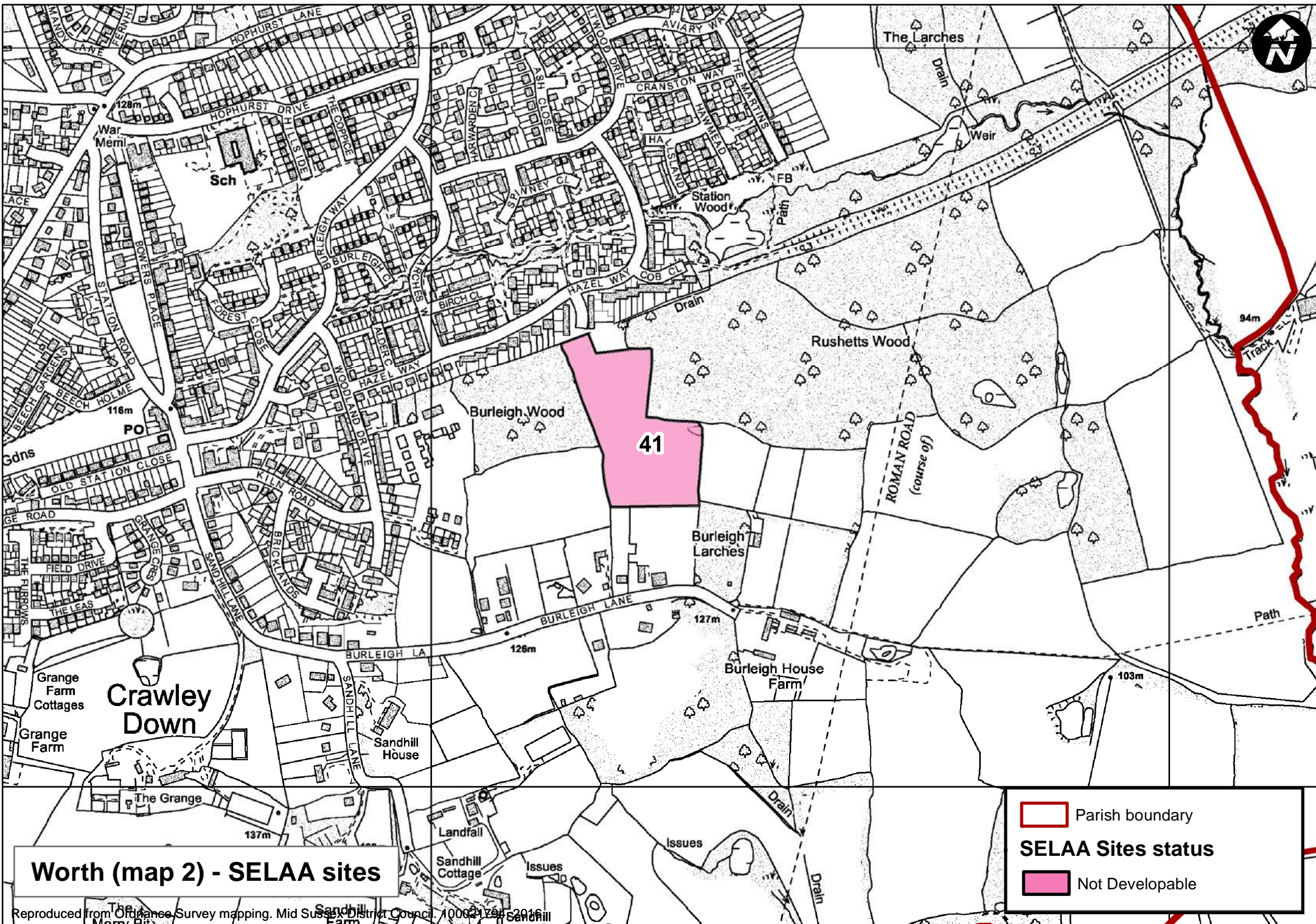


West Hoathly (map 1) - SELAA sites

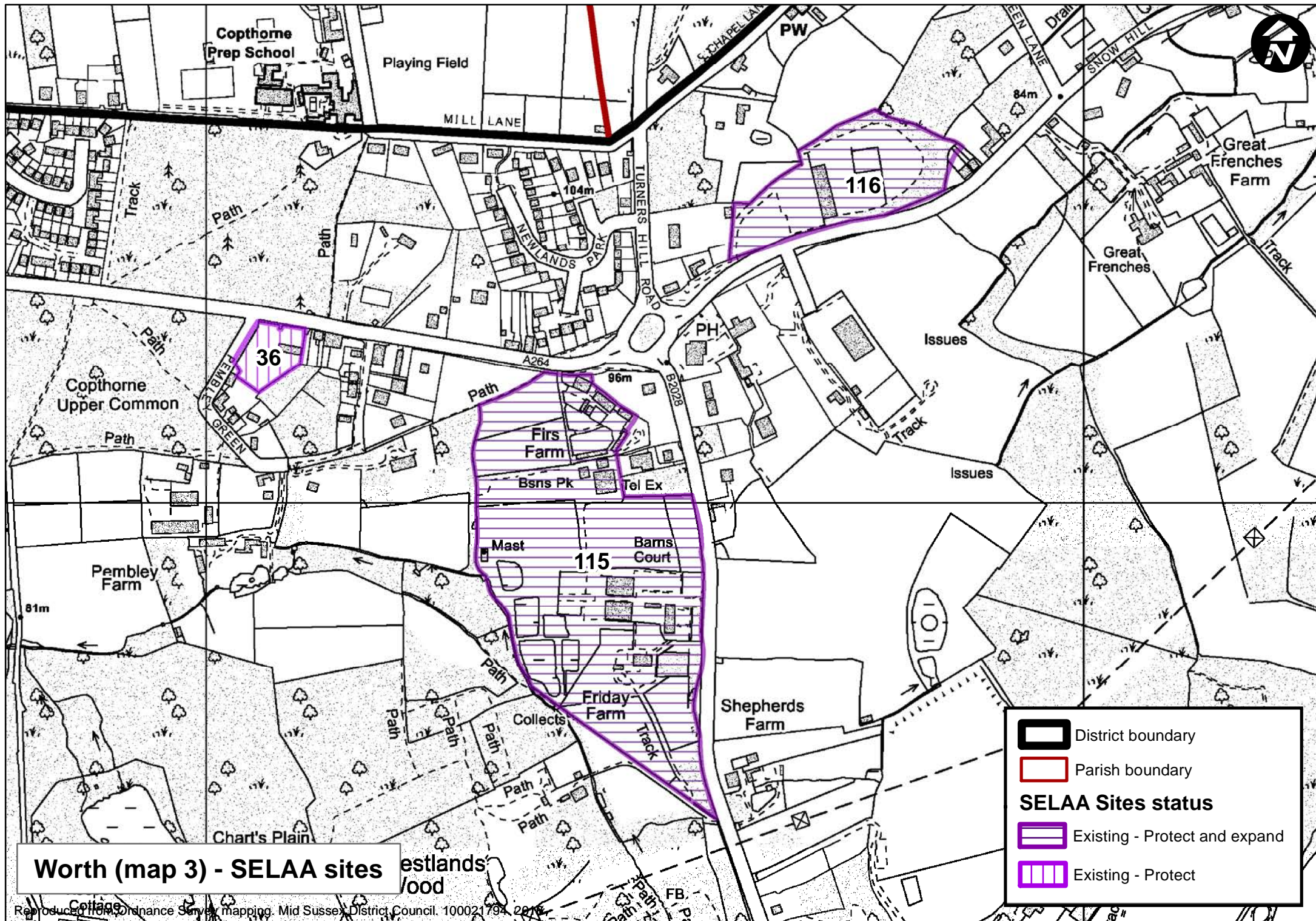
SELAA Sites status

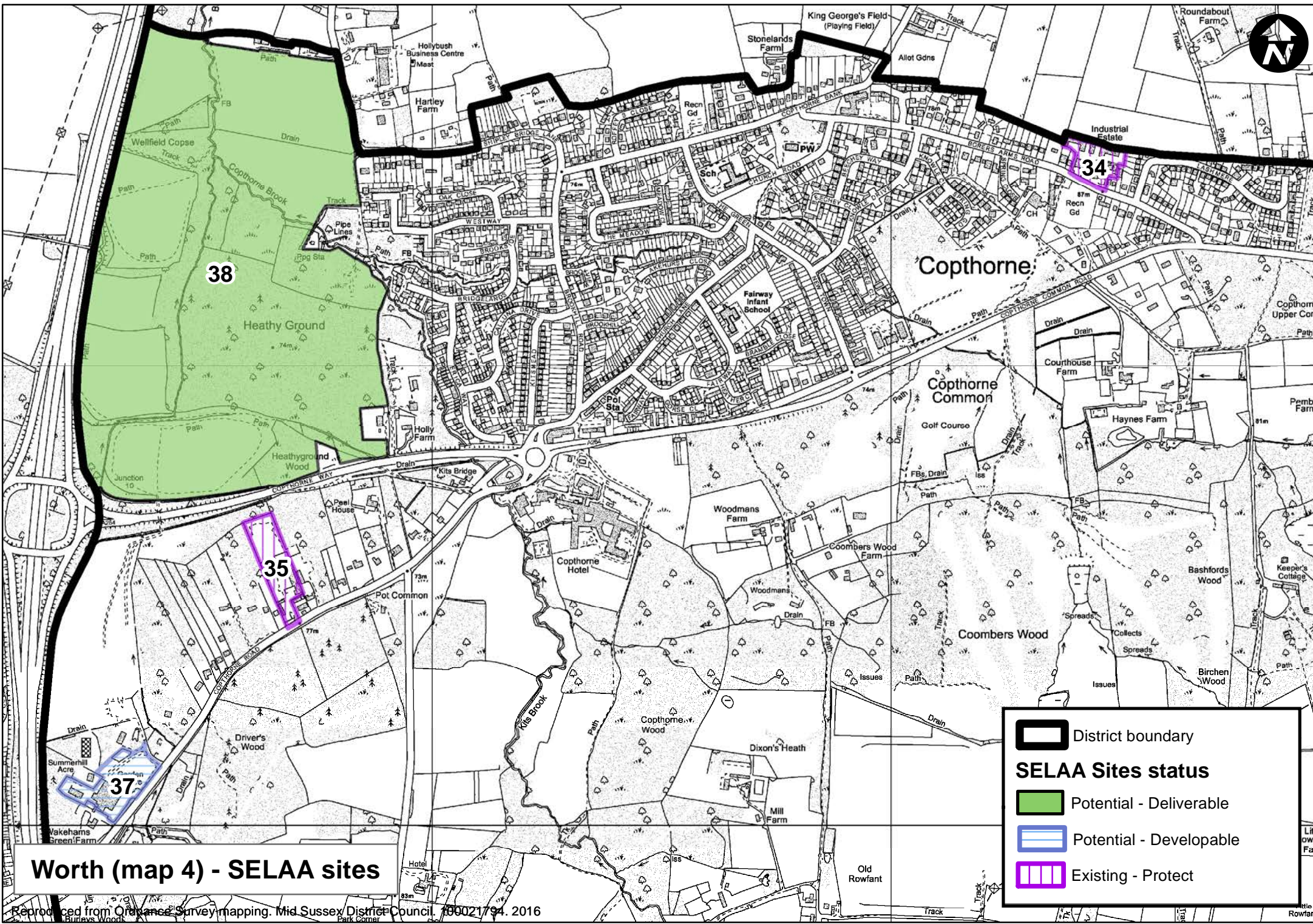
- Not Developable
- Existing - Protect









Worth (map 2) - SELAA sites





Worth (map 4) - SELAA sites

Legend

-  District boundary
- SELAA Sites status**
-  Potential - Deliverable
-  Potential - Developable
-  Existing - Protect