Exeter Employment Land Review 2009

Exeter City Council

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Executive Summary

1 The Employment Land Review (ELR) is required by the Government as part of the evidence base necessary in support of the Local Development Framework (LDF). Its purpose is to assess the suitability of existing and potential employment sites for employment purposes. This guidance will be used in the preparation of the LDF to ensure that the best employment sites are safeguarded in the face of competition from other higher value uses and to identify employment sites that might be brought forward for a different use if no longer required by the businesses that occupy them.

2 The Review evaluates existing employment areas and sites by considering the age, and quality of the accommodation, its accessibility, parking and unloading facilities, public transport links, surroundings, prominence and proximity to similar activities. It also evaluates proposed employment sites and additional areas that might be considered for employment should the need arise. The aim is to understand the suitability of the land or buildings concerned from the point of view of typical future businesses looking for accommodation and from the perspective of the planning authority seeking the best possible arrangement of land uses in its area.

3 The Review concludes that, with the exception of the Haven Banks/Water Lane area, all the larger employment areas outside the City Centre are of good quality and should be retained. However, the area south of Harrington Lane needs to be revitalised through the provision of better road access and through mixed development including some residential development.

4 Southernhay is regarded as the prime location for City Centre offices and should be protected from the incursion of other uses. Whilst most other City Centre office locations do not seem markedly less suitable they are, in general, less attractive to prospective occupiers.

5 The City Centre is not a very suitable location for most industrial/warehouse businesses and these have tended to move out to the edge of the City. This process may create opportunities for the provision of modern offices as part of mixed developments offering many of the advantages provided by Southernhay. Investigation of this possibility in the Summerland Street Area and at the bottom of Fore Street is recommended.

6 Whilst proposals to provide offices at Central Station Yard and at St David's Station as part of a mixed used development are supported, there may be a reluctance to bring these schemes forward in the current market. On the other hand the Local Plan First Review proposals to provide employment on the land south of the A379 and West of Exeter Business Park are strongly supported. The A379 land in particular is seen as especially suitable for employment use.

7 Bishops Court Quarry is a brownfield site identified as being suitable for employment development. The Bus and Coach Station in the City Centre also presents the opportunity for employment redevelopment as part of a mixed development. Greenfield land to the West of the M5 motorway, close to junctions 29 and 30, is also put forward as being suitable, provided flood risk can be avoided.

1.0 INTRODUCTION

Objective

1.1 The aim of the Review is to establish the suitability of land and buildings in the City, including local plan allocations, for employment use. This is to inform policies and proposals in the Local Development Framework (LDF) aimed at determining land that should be retained for employment use or released for other uses.

1.2 This requires:

- an understanding of the likely future need for land and buildings of different types and in different locations; and
- an assessment of the suitability of existing and potential employment sites and buildings in relation to the anticipated requirements for the future

Government Guidance

1.3 Draft Planning Policy Statement 4 - Planning for a Sustainable Economic Future, (DCLG, 2007), advises that local planning authorities should use a wide evidence base to understand both existing business needs and likely changes in the market, and to assess the existing supply of land available for economic development. This process should take into account the different requirements of businesses including the location, accessibility, size and quality of sites needed and available. An up-to-date assessment of the demand for employment land should be maintained taking into account market conditions and trends, economic data, including price signals, and the needs of different types of economic development.

1.4 The ELR has been carried out in accordance with 'the Employment Land Reviews Guidance Note' published by the Office of the Deputy Prime Minister (ODPM, 2004) (now the Department of Communities and Local Government, DCLG) adopted in light of local circumstances. The guidance note advises that the Review should comprise three separate exercises:

(i) taking stock of the existing situation by:
- collecting data on land stock and revealed demand; and
- devising and applying site appraisal criteria;

(ii) creating a picture of future requirements (taking into account the local and regional information) by:
- identifying market areas and segments,
- preparing a forecast model and demand analysis,
- quantifying the employment land supply, and
- translating employment forecasts into land requirements;

(iii) preparing a new portfolio of significant sites by:
- undertaking a qualitative site appraisal,
- confirming existing sites to be retained or released, and
- identifying new sites.

1.5 Exercise (ii) above has been undertaken by the Exeter Employment Study (Atkins, 2007), the main conclusions of which are summarised in Section 3 (see para 3.3).

1.6 The guidance note emphasises the need for local planning authorities to do the work in consultation with regional planning bodies, neighbouring authorities and the local business community.

Structure of the Review

1.7 The ELR was undertaken using the iterative processes recommended by the Government guidance, but is presented in the order set out below:

1 This introduction describing the background to the Review and the means by which it was carried out.

2 a summary of the national and regional policies affecting provision of employment land that create a framework within which planning decisions need to be made. This provides the basis for determining whether land is suitable for employment purposes from a planning point of view.

3 an assessment of the amount of employment land that is required taking into account, in particular, the draft Regional Spatial Strategy (RSS) proposals and the results of the Employment Study prepared by Atkins for the City Council, published in March 2007. This is included in the Review to establish overall demand and supply for employment land.

4 an assessment of the location, type and size of employment sites and buildings required bearing in mind long term employment objectives, the results of recent studies forecasting future requirements, and evidence of current demand. The purpose of this section is to establish the kind of sites needed to meet the future requirements of businesses.

5 the formulation of criteria, derived from the assessment in 4 above and taking into account the policy background and the overall need for employment land, to enable the suitability of existing sites, buildings and allocations to be assessed.

6 the evaluation of employment sites, buildings and allocations in the City in accordance with the criteria formulated in Section 5 - this section brings together the results of all the preceding work.

7 conclusions drawn from the Review.

1.8 The main body of the Review is supported by appendices and plans showing the location of employment sites in the City. Appendix A lists the sources of the information used. Of particular importance are databases maintained by the Council recording inquires from prospective occupiers of business premises (Inquiries Register), business premises that are currently on the market (Property Register), and land that is covered by planning permissions for employment development that

have not been implemented (Employment Planning Permissions and Completions). These provide the basis for a database on the supply and availability of premises of different types that can be continuously updated.

1.9 References to the Appendices give first the appendix reference letter and then the paragraph number e.g paragraph 5 of Appendix C is presented as C5. Acronyms are explained in the Glossary in Appendix M.

Local Context

1.10 Exeter is an historic City surrounded by and supporting a large rural area. Appendix B sets out the key economic characteristics of the City.

1.11 The City's economy has, until recently, been developing rapidly as indicated by information provided by Appendix C.

1.12 The Exeter Local Plan First Review (Policy E3), adopted in March 2005, opposes the loss of employment land where it would harm business and employment opportunities. This is set out in D13. Other relevant Local Plan policies are summarised by D14. These policies have been saved in accordance with requirements of the Planning and Compulsory Purchase Act 2004 pending adoption of relevant Local Development Framework documents.

Scope

1.13 The Government guidance advises that a systematic approach is adopted to evaluate employment land. In order to do this the Review, in Section 4 below, seeks to identify the needs of typical office and industrial/warehouse businesses in the period up to 2026. Whilst the distinction between offices and industry/ warehousing has limited practical value outside the City Centre, where land and sites tend to be suitable for a variety of uses, it does have the advantage of providing a focus on the most easily distinguishable types of employment use.

1.14 Relating site requirements to these two types of employment is necessary to provide a rigorous and comprehensive basis for evaluating sites. It is important, nevertheless, to be aware of issues that arise from it.

- The future requirement is for a wide range of sites meeting a variety of needs. A site which achieves a high score in relation to typical requirements will not necessarily meet the specific needs of some businesses.

- Only activities within the class B business use class and therefore within the terms of reference of an employment land Review are considered. The importance of other activities to the local economy is recognised.

- Planning permission is not required for the change of use of offices to light industry and vice versa. Similarly permission is not required for change of use of warehouse buildings with floor areas of less than 325 sq m to offices or light

industry. This allows flexibility in response to operational requirements or market forces.

1.15 The assessment includes a comparison of the suitability of sites for employment within the City from a planning point of view. The City is a long established compact urban area with a comprehensive public transport system and a wide range of facilities. Consequently, even the sites within the City that are least satisfactory from a planning point of view are very much better than most alternatives in surrounding rural areas. The overriding consideration in the Review is, therefore, the suitability of sites from a prospective user's point of view.

1.16 It also needs to be kept in mind that because of the City's relative prosperity most existing sites are likely to remain in employment use for the foreseeable future. The fact that a site may appear not to be very suitable for employment as a result of the assessment does not necessarily mean that it is not suitable for the particular business that occupies it. Furthermore, an employment site and its occupiers may satisfy important social and employment needs of the local community. Due to the need to apply criteria applicable to the whole city over a long period of time, the ELR, by its nature, is not able to identify these local factors.

1.17 There is both a wide range of potential site requirements, and a broad range of employment sites of different kinds. The scope of the Review has been narrowed in accordance with advice in the Employment Land Reviews Guidance Note; only sites that are more than 0.25 ha in extent are covered by the Review. It is difficult to obtain accurate up to date information about smaller sites and they are more likely to be occupied by businesses that have significant local links.

Consultation

1.18 The South West Regional Assembly (SWRA), neighbouring local authorities and the South West Regional Development Agency (SWRDA) were provided with a copy of the brief for the preparation of the Review. A first draft was developed with the help of a small consultation group comprising representatives of local business groups, land agents and developers and the SWRDA. They advised on the main issues and, in particular, on the weight that should be given to each of the criteria to be used to assess user requirements. Local employers, agents, land owners, developers and other interested parties were asked to give their views on the draft in June 2008. At the same time they were asked to check the accuracy of the information it provided. The document was extensively modified as a result of this consultation.

Economic Recession

1.19 The Review relies heavily on research carried out before the current recession arising from it had been anticipated. Long term objectives are, however, unlikely to change and it is important that their achievement is not prejudiced by decisions made to deal with short term issues.

1.20 A summary of economic indicators and the Economic Review published by SWRDA is provided by Appendix C9. Further information is provided by the Exeter Retail

Study (2008). In general terms the recession is likely to cause a reduction in the amount of development, a decline in land values and an increase in vacancies as more vulnerable businesses contract or close down. Relatively unsuitable sites that become vacant are less likely than other employment land to be brought back into employment use when recovery takes place.

Fuel Prices

1.21 Recent experience has shown there to be a significant relationship between fuel prices and use of public transport. Relatively high petrol and diesel prices are accompanied by increased public transport use and vice versa. A further sharp increase in petrol prices is likely to affect car use and therefore choices about where to work. This could clearly have repercussions for favoured locations both from a planning and prospective user's point of view.

Monitoring

1.22 The annual surveys referred to in paragraph 1.8 and the quarterly survey of economic trends undertaken by the Council, together provide the basis of an annual review of the supply of employment land of different types to which relevant information from one off studies can be added.

2.0 POLICY FRAMEWORK

National and Regional Policy Guidance

2.1 The overall objective of national (see appendix D1-6) and regional (D7-10) guidance is to ensure that there is a strong, stable, and productive economy of benefit to everyone. Improved productivity, choice and competition are sought especially where technological and other changes are taking place. Emphasis is on the raising of productivity; the expansion of the knowledge driven economy and the need to support the development of key established and emerging businesses.

2.2 A requirement for a range of appropriate employment sites is identified to cater for both organic growth and inward investment. Such sites should be capable of accommodating businesses of different sizes and enable businesses involved in related activities to be grouped together.

2.3 The guidance encourages a flexible approach to the provision of employment land responding to economic change and the requirements for infrastructure and housing.

2.4 The RSS identifies Strategically Significant Cities and Towns (SSCTs), including Exeter. These should be the focus of employment and other development in order to maximise accessibility between jobs and where people live.

2.5 Guidance encourages the location of major traffic generators at public transport interchanges in order to reduce the need to travel by private car. Employment

developments that generate a lot of traffic will be resisted where this is likely to cause congestion on the trunk road system.

2.6 Preference is for offices to be located in or near town centres so that they can easily be reached by public transport and, for many residents, on foot or cycle. The availability of a wide range of facilities in a town centre widens the scope for trips combining work, shopping and leisure.

2.7 The use, as far as possible, of previously developed land to meet employment needs is advocated to allow best possible use to be made of existing facilities and infrastructure and to minimise potential harm to the landscape and wildlife habitats.

Policy Implications for Exeter SSCT

2.8 The concentration of new employment development at SSCTs, like Exeter, is a key proposal of the RSS in order to limit environmental impact and encourage travel by most sustainable modes. Nearly all potential sites in the City are, in comparison with potential locations in the surrounding area, very suitable from a planning point of view. However, for the RSS approach to be successful and its benefits to be realised, it is important that the needs of employers seeking sites in the SSCT are met as fully as possible.

2.9 Sites in the City Centre are especially suitable for offices but, unfortunately, very few are available. Peak hour traffic congestion and associated limits on car parking are also seen by some employers as a constraint that overrides the sustainability benefits.

Commitments and Allocations

2.10 The RSS proposed changes for the period 2006 to 2026 provide for about 40 hectares of employment land within Exeter's urban area, about 100 hectares adjacent to Exeter (in Exeter and East Devon) and about 20 hectares to the east of the City in East Devon.

2.11 The Exeter Local Plan First Review provides for development on land:

South of the A379;
at Exeter Business Park;
at Pinhoe; and
at St David's Station.

2.12 Allocations for employment development in the Local Plan First Review and unimplemented planning permissions in the City together comprise around 40 hectares. These are considered in detail in Appendix K.

2.13 Major developments are proposed immediately to the east of the City, in East Devon:

- 40 ha strategic employment site at Skypark, next to Exeter airport. East Devon District Council has resolved to grant planning permission subject to resolution of outstanding issues by means of a legal agreement;
- 25 ha science park adjoining M5 junction 29. A Supplementary Planning Document (SPD) setting out main principles to be followed in the development has been adopted and a masterplan has been prepared; and
- 10 ha at the new settlement proposed at Cranbrook. East Devon District Council has resolved to grant planning permission for this development subject to the signing of a legal agreement.
- An intermodal freight facility and distribution centre to the south of the Exeter to Waterloo rail line between the motorway and Cranbrook was granted outline planning permission in 2007.

3.0 AMOUNT

3.1 According to the figures provided by the Council's Employment Planning Permissions and Completions Survey, the amount of available employment land has been greatly reduced in recent years as a result of a relatively large number of completions (see Appendix C8). Problems arising from the shortage of employment land are described by Vickery Holman (see Appendix H2).

3.2 Roger Tym and Partners also highlight, in their 2006 report the shortage of readily available land particularly for indigenous industry (see Appendix F6-8).

3.3 Atkins were commissioned by the Council in 2007 to consider whether the employment proposals in the draft RSS were appropriate in the light of the Exeter situation and to provide more detailed guidance as to the amount of land that would be needed. They concluded that 150.5 ha is required in the Exeter Travel to Work Area (TTWA) of which 118 ha are required in the Exeter SSCT area. They comment that the RSS allocation would create a sufficient allowance for the establishment of new enterprises, expansion of indigenous businesses and significant inward investment in key knowledge-based sectors driven by a strong growth policy agenda. Atkins also, however, highlight a current short-term shortage of employment land in the City (see Appendix F15-18).

3.4 Particular difficulties in providing additional employment land in the Exeter area can be anticipated because of the relatively high value of housing land. According to the Valuation Office Agency property market report in July 2007 the average value of industrial land in Exeter was £800,000 per ha, somewhat above the average for the South West Region. The average values recorded for residential land in Exeter varied between £3,000,000 and £4,000,000 per ha. This was considerably higher than the regional average, exceeded only by Bath.

3.5 Furthermore the findings from the above studies in terms of the need for additional land do not take into account the need to modernise existing provision. In some

cases this may result in the loss of existing employment sites to other uses because, due to their size or location, they are not economically viable to modernise. This will create additional demand for employment land that is being brought forward. Assessing the quality of existing provision is a major purpose of the Review.

3.6 The actual amount of land required will depend upon the performance of the local economy. Most of the figures available refer to conditions before the economic recession. The indications are that Exeter may suffer less than other places due to its growing importance as a focus for economic growth. However, uncertainty about the future complexion of the local economy underlines the need to be sure that available employment sites can, between them, accommodate the widest possible range of employment needs.

4.0 TYPE, SIZE, QUALITY AND LOCATION

Employment Type

4.1 The employment objectives identified in Appendix E support provision of suitable land/accommodation for the following types of employment:

- Information and Communication Technology (ICT);
- professional and business services;
- biotech, medical and healthcare research;
- environmental technology;
- small scale advanced engineering;
- knowledge based public sector activities;
- arts and creative industries; and
- food and drink.

(Exeter and Heart of Devon Economic Strategy)

- science and technology park with anchor research and development (R&D) facility;
- expansion of the Innovation Centre at the University of Exeter;
- additional managed workspace and offices; and
- social enterprise businesses.

(Sustainable Community Strategy: Exeter Vision)

- arts and media organisations including those involved in digital/electronic media.

(Arts and Media Strategy)

4.2 The City Council, East Devon District Council, Devon County Council, the University of Exeter, and the RDA are committed to the provision of the science and technology park at Redhayes in East Devon (see para 2.13). It is anticipated that this will be suitable for several types of business mentioned above, particularly biotech, medical and health care research, ICT and environmental technology. The Innovation Centre at the University has recently been extended.

4.3 The employment studies referred to in Appendix F anticipate that there will be growth of employment in ICT, creative industries, biotechnology and in professional and business services. Expansion of the environmental technology industry is expected but is likely to be dispersed. The need for additional space for advanced technology is likely to be limited and there is little long term prospect of growth in the food and drink industry. On the other hand, the studies predict additional employment in miscellaneous services, distribution, electronics, transport and communications, and insurance. Whilst the estimates of the amount of growth in key sectors prepared by the two SWRDA studies (see Appendix F2 & 3 and F9 & 10) cannot easily be related, both refer to the growth areas identified above. Atkins' breakdown of projected growth in employment by sector shows the bulk of additional employment being provided by distribution; banking, finance and insurance and by public sector services (see Appendix F17).

4.4 Past trends tend to support the projections except that there has been a sharp decline in the amount of employment in biotechnology in the sub-region since 1996 (see Appendix C7). This has arisen, according to Atkins Exeter Employment Study (see para 3.69), because of the loss of a major employer in 2003. But for this, employment growth in the sector has been at a rate of 4.1%, slightly above the regional level.

Accommodation Requirements for Employment Types

4.5 ICT, creative industries, professional and business services and insurance are likely, almost exclusively, to require office accommodation. Miscellaneous services; electronics, and transport and communications, are expected, in the main, to require industrial premises. Warehouse space will be required for distribution although most employment in this sector is likely to be in shopping centres. The stock of employment land should also be capable of accommodating other businesses in key areas such as advanced engineering, food and drink and environmental technology even though growth is not anticipated. Accordingly the local economy is able to respond flexibly to change in demand.

4.6 According to the Council's records (see Appendix G3); over 60% of inquiries for employment land in Exeter during the past year were for office space. Allowing for plot ratios of 0.4 on employment sites on green field sites, DTZ Consulting and Atkins both appear to agree that around 190,000 sq m of additional floorspace will be required to accommodate offices in the period up to 2026 in the Exeter SSCT (see Appendix F12 & 18).

Size – Offices

4.7 The City's Sustainable Community Strategy (Exeter Vision) sees a particular need to foster the expansion of smaller businesses (see Appendix E1). This is supported by the objectives of the City's Culture and Arts and Media Strategies (see Appendix E3).

4.8 The SWRDA study (February 2005) saw scope for accommodating a wide range of office types including new small businesses, branches of national firms and space for re-locating Government offices (see Appendix G8). The City Council's Inquiry

Register (see Appendix G4) and records from Vickery Holman (see Appendix G11) show that most interest is in small units. On the other hand the limited number of inquiries for larger units account for more floorspace. To some extent the need for smaller office units can be met through sub division.

Size – Industry and Warehousing

4.9 The South West Regional Economic Strategy (RES) (SWRDA, 2006) anticipates reduced demand for large sites for manufacturing offset partly by greater need for small and medium sized units, including space for advanced engineering and environmental technology (see Appendix F9). Vickery Holman reports increased demand for trade and distribution premises but they consider demand from larger distribution facilities is likely to be limited because of the lack of large accessible sites (see Appendix G12 & 13).

4.10 The Council's Inquiry Register suggests that the demand for industrial/storage buildings is greatest for units between 200 and 1500 sq m (see Appendix G5). Vickery Holman receives considerably more inquiries for smaller premises (see Appendix G14). Demand for larger units appears to be mainly for warehouses and self storage (see Appendix G14). It is generally more difficult to sub-divide industrial buildings than it is to sub-divide offices.

Quality – Offices

4.11 The quality of premises is an important consideration for prospective office occupiers especially those involved in ICT and creative industries (see Appendix F2, G9 & 20). Priorities vary but main requirements are:

(a) good information technology (IT) infrastructure including high band width internet access especially for ICT and creative industries - to some extent the introduction of wireless systems may have reduced the need for built in facilities.

(b) attractive surroundings including high quality landscape and buildings - this is especially important for some businesses for whom image is important;

(c) modern attractive accommodation in good condition - this should facilitate modern working practices perhaps including open plan layouts and air conditioning; and

(d) car parking on or near the site

Quality- Industry/Warehousing

4.12 Quality of accommodation can also be important for prospective occupiers of industrial and storage buildings (see Appendix F2 & G19). The main interest is in requirements relating to the function of the premises and its ability to meet regulatory requirements e.g. the circulation and unloading facilities of commercial buildings,

rather than the appearance or construction of the buildings. Advanced engineering, in particular, requires high quality accommodation. Sufficient car parking is also very important.

Location – Offices and Industry/Warehousing

4.13 Policy guidance on the location of employment sites is provided by Appendix D 1–4. Information about the locational needs of employers is included in Appendix F 5, 6, 12, 13 & 14 and in Appendix G 13 & 17-20. The patterns of vacancies in the City are indicated throughout Appendix K.

4.14 Good accessibility by road is of paramount importance to most firms. In particular, from a practical and planning point of view, businesses that generate a lot of movement by heavy goods vehicles need to be connected to the national trunk road network via short, clearly defined, routes that do not pass through residential areas or town centres and are reasonably free flowing. For some, frontage onto a busy road is desirable in order to raise public awareness of their business.

4.15 Considerable planning and practical advantages flow from the location of employment within easy walking distance of public transport interchanges, especially where a large number of jobs are provided.

4.16 Development on previously developed land is desirable from a sustainability point of view. In practice most of this land is also suitable for housing development.

4.17 Offices, and to a lesser extent, industry/warehousing businesses benefit from being grouped together because this facilitates access for clients and suppliers, joint working and sharing of facilities. The need for good access to main road systems and public transport interchanges results in the concentration of businesses in locations where this is provided. This has probably contributed to the tendency for isolated employment sites to be lost to other uses in recent years. Another factor that contributes to the loss of isolated employment sites, is the comparatively high returns available from redevelopment to other forms of development, particularly housing. The dispersal of businesses, especially industry, can lead to conflict with other uses, particularly housing, because of noise and pollution from the site, movements of heavy goods vehicles and on-street parking. However, it is important to note that there are also potential benefits arising from the provision of services and employment close to housing and other activities.

4.18 To minimise congestion and reduce environmental problems, employment sites should be accessible to residential areas, particularly those with high levels of deprivation, for people travelling on foot, by cycle or on public transport. Good accessibility from areas that are economically deprived is desirable in the interests of social inclusion. At the same time situations in which employment uses, particularly some types of industrial activity, cause damage to the amenities of dwellings and other vulnerable uses must be avoided.

4.19 Close proximity of work places to shopping centres, restaurants and other facilities have advantages for employees, and from a planning perspective, because the need to travel is reduced.

4.20 Government and regional guidance encourages the location of offices in town centres where a wide range of facilities and good public transport links are available. Although most recent office development in Exeter has been outside the City Centre it is evident that, for many offices, it is a very desirable location. A major difficulty is that many firms consider that on-site parking is essential. Travel to work in the City Centre, much of it relying on private transport, is a major cause of peak hour congestion, something that employers see as a significant disadvantage of a City Centre location.

4.21 Atkins suggests that 60,000 sq m of the 194,000 sq m of office floorspace that they anticipate will be provided in the Exeter area could be located in the City Centre. They anticipate that this would occupy around 6 ha.

4.22 Some types of business require access to high density communication and power connections (see para 4.11). These are not necessarily easy to provide in all locations.

4.23 The Exeter Sustainable Community Strategy (Exeter Vision) emphasises the need to improve opportunities for people who currently have limited skills and low incomes (E1). This should be taken into account when considering the location and type of employment available. Especially deprived areas are identified by Appendix B14.

4.24 It is especially important for some offices, and some other employment activities to have attractive surroundings with extensive planting and good quality architecture (see para 4.11). Some businesses will look for prestige locations that are prominent and have positive associations with, for example, the heritage of the area.

4.25 Where land is being considered for employment that has not previously been developed, consideration must be given to the capacity of the landscape to accommodate it visually, the potential flood risk and any damage to natural habitats.

5.0 ASSESSMENT METHOD

Introduction

5.1 The assessment of the suitability of employment sites and areas is necessarily subjective because there are many intangible factors involved, limits in the amount of information available and the large numbers of possible variables. Moreover the Review is required to consider requirements over a long period up to 2026 during which changes are likely that are difficult to anticipate. Where possible, the assessments include measurable attributes of sites such as their distance from accesses to trunk road and public transport interchanges but these can only be used to provide an indicator as to the actual or perceived quality of the site. It is important to recognise that the suitability of a site depends upon how well it meets a variety of possible requirements bearing in mind the wide range of businesses that it might be expected to accommodate and potential changes in business needs up to 2026.

User and Planning Considerations

5.2 Planning policies and guidance relating to employment land are described by Appendix D. The City, is an especially good location for employment development from a planning point of view because it is a compact urban area that is well served by public transport (see para 1.15). Accordingly, from a planning perspective, although individual sites and areas in the City vary in quality in comparison with each other, in general they tend to perform much better than equivalent ones in the surrounding, mainly rural, area. Section 3 above highlights that before the recession there was a shortage of employment sites of sufficient quality to meet user requirements and that it was difficult to provide additional land because of the higher return available for housing development. In these circumstances the suitability of land from a prospective user's point of view is more important than its suitability from a planning perspective.

5.3 Greatest potential conflicts between user and planning requirements arise from the planning guidance and policies giving priority to the re-use of previously developed land and encouraging offices to locate in town centres. Differences in requirements may also be significant when considering the relationship of employment sites to their surroundings. Furthermore, on greenfield sites, user requirements need to be balanced against the impact of employment on adjacent uses when compared with possible alternative uses of the land.

5.4 Following consultation, in particular with the Exeter Chamber of Commerce and SWRDA. it was concluded that outside the City Centre, the needs of offices and industry/warehousing were sufficiently similar to allow them to be considered together. However, in the City Centre the suitability of sites for offices and industry/warehousing is considered separately because the policy implications and priorities for a location in the Centre are different. Good access to the trunk road system is not available and large amounts of parking for employees is difficult and expensive to provide so proximity to public transport interchanges is especially important. A major advantage of the City Centre from a planning and user perspective as a location for an office is the concentration of a wide range of shops, other businesses and other facilities in its area. The extent to which an office can benefit from this is important when considering possible buildings or sites within the Centre.

Types of Employment Development

5.5 The Review considers first the suitability of existing sites, including their potential for redevelopment to improve their viability for employment use. Sites with planning permission or allocated for employment by the Local Plan First Review are then assessed, followed by an appraisal of previously developed land not currently in employment use. The suitability of possible greenfield sites is then considered bearing in mind that the future employment needs of the City cannot be fully met in existing employment areas or by making use of brownfield field sites.

City Centre Offices

5.6 It needs to be emphasised that it would be impossible to meet all the City's future office requirements in the City Centre. The City Centre contains very little vacant or underused land. In the past, where opportunities for redevelopment arose retail and residential uses were preferable to offices from the developer's point of view because they provided a better return on investment. Many sites would probably not come forward for redevelopment if allocated entirely for office use. Whilst some office employers would prefer a City Centre location, it is unlikely that all of these could be accommodated.

Redevelopment

5.7 The review of existing employment sites and areas includes an assessment of the scope and viability of redevelopment to enhance their suitability for employment. The main benefit of this is likely to be the provision new accommodation reflecting current user requirements and, if necessary, increasing the amount of parking and improving access and circulation arrangements.

5.8 The scope for redevelopment of industry/warehouse sites in the City Centre to provide offices is explored in particular. Many premises of this type have come forward for redevelopment in recent years as the City Centre is not, generally, a good location for these uses from a planning and user point of view. To ensure viability it is assumed that new offices will form part of a mixed development including residential and, where appropriate, retail. It is anticipated that in developments of this type potential conflicts between uses will be avoided by careful design.

Development of Brownfield Sites

5.9 Planning guidance requires that priority should be given to development or retention of employment activities on previously developed land so that the loss of green field sites can be reduced (see para 2.7). In most cases previously developed sites can be brought into another use such as housing.

Development of Greenfield Sites

5.10 Where land is being considered for employment that has not previously been developed, consideration must be given to the capacity of the landscape to accommodate it visually and any potential flood risks or damage to natural habitats. All but one of the potential employment areas on greenfield land have also been identified as potential housing areas. In these cases a comparison between the impact of employment development as opposed to housing is necessary. Appraisals of green field sites take into account proposals and likely developments in the surrounding area including housing, community facilities and improved public transport links.

Assessing Quality of Employment Sites

General Considerations

5.11 The importance attached to each of the different site attributes has been arrived at following consideration of the objectives, projections, trends and current requirements as set out in Appendices C to H and the views of consultees.

Vacancies, History and Rents

5.12 Appraisals of individual employment sites and areas take account of information available about current and past vacancies, comparative rent levels and any other information available about their performance and likely future. This provides a means of relating assessments to what is actually happening on the ground and is helpful is assessing whether employment sites should be retained.

Travel Distances

5.13 Travel times, modified to reflect the quality of the experience, are of crucial importance when considering the suitability of the location of employment sites. Journey times are a product of distance and mode of travel adjusted by factors such as width, gradients, the nature of intersections and crossings and traffic flows. However, for reasons of practicality the Review makes use of distance as a proxy indicator of journey times and quality factors. In practice the most areas are served by good quality roads well able, at the moment, to accommodate the amount of traffic using them.

5.14 Guidance varies on appropriate convenient walking distances to facilities. 500 m, equating to a journey time of between 5 and 7 minutes, has been selected as an indication of what an employee is likely to consider a reasonable distance to walk to a bus stop, shop or another business. 1000 m is suggested as an appropriate distance to cover when walking to work. It is suggested that as distances increase beyond this there is a strong temptation to chose another mode of travel or abandon the journey.

Primary and Secondary Requirements

5.15 Primary requirements are single attributes of a site that are likely to be considered essential by most prospective employers. Secondary requirements are less vital and generally only become important once primary requirements have been met. Primary requirements for City Centre Office sites are different from the primary requirements of other sites and are more likely to be required in combination. For example, in the City Centre, both adequate car parking and proximity to good public transport connections are necessary to enable sites to be conveniently accessible to as many people as possible. Identifying primary and secondary requirements enables general areas to be defined within which employment sites are most likely to be suitable.

Primary Requirements – All Sites

Quality of Accommodation

5.16 As indicated in para 4.11 the quality of accommodation, including the appearance and modernity of buildings is particularly important for offices. For industry / warehousing it is important that operational and regulatory requirements are met.

5.17 The average age of the buildings on the site, adjusted to take into account any evidence of improvement, has been used to assess the quality of accommodation currently in employment use. It is assumed that where re-development or new development is envisaged, new buildings will be of high quality reflecting contemporary requirements.

Car Parking

5.18 It is vital to businesses that they have enough parking for vehicles based at or operating from the site. Outside the City Centre it is essential that there is enough parking for visitors and a significant proportion of employees.

5.19 Most people working at or visiting employment sites outside the City Centre travel there by car. However, some modal shift should be possible without discouraging employment development by imposing parking constraint and the planned improvements to facilities for public transport, cycling and walking. To the east of the City where there are existing and potential future concentrations of employment these will be accompanied by substantial transport infrastructure investment.

5.20 In the City Centre the need for parking is reduced as visitors and employees can reach the site conveniently by public transport (see para 5.25) or use public car parking in the vicinity.

5.21 Planning policies and guidance seek to limit the amount of on-site car parking in order to reduce car use. Restraint of on-site parking for City Centre offices is appropriate to ensure that non-car modes are used as fully as possible. The Local Plan First Review only permits operational parking within the Pedestrian Priority Area.

5.22 City Centre office sites need to be within easy walking distance of public car parks ensuring that the needs of visitors and employees who cannot easily reach the site by public transport are met.

Primary Requirements: All Sites other than City Centre Offices

Access to Trunk Road Network

5.23 Other than for City Centre offices, good access to the trunk road system is a key requirement determining the suitability of sites for employment. Good accessibility by road is of paramount importance to most firms. In particular, from a practical and planning point of view, businesses that generate a lot of movement by heavy goods

vehicles need to be connected to the national trunk road network via short, clearly defined, routes that do not pass through residential areas or town centres and are reasonably free flowing. Travel to work outside the City Centre is primarily by car, reflecting the current limitations in other modes. Whilst in many locations there is scope to increase travel to work by public transport, cycling and walking, the user requirement will continue to be for good access to the trunk road system.

5.24 Three zones, shown on Plan 1, are determined by their accessibility to the trunk road system. Areas close to the M5 junctions are clearly the most accessible (Zone I). Locations that are further away but connected by the outer bypass or well related to the A30 dual carriageway also have advantages (Zone II). Zone III covers the rest of the City excluding the City Centre. Zones I and II are described in more detail below:

Zones of Accessibility to Trunk Road System

Zone I takes in areas within 1.5 km of M5 junctions by means of modern two way roads with intersections formed by roundabouts or light controlled junctions; and

Zone II covers areas with similar quality connections to:

- M5 junctions over a distance of between 1.5 and 2.5 km;
- up to 1. km of the Outer Bypass; or
- up to 1.5 km of the junction of Alphington Road with the A 30.

Zone III comprises the rest of the City excluding the City Centre.

It is important that access arrangements to all sites are considered in detail both to confirm that the site really is as accessible as its zoning suggests and to enable comparisons to be made between sites within the same zone.

Primary Requirements – City Centre Offices

Access to Public Transport

5.25 The extent to which public transport is used to reach a site depends upon the distance and convenience of pedestrian routes linking the site to bus stops/railway stations; the number and importance of the destinations that the service connects to and the quality, especially the frequency of the journeys offered.

Access to Shops and other Facilities

5.26 The location of offices in the City Centre benefits clients, management and staff by enabling them to easily combine business with shopping, leisure and a range of other activities. The shopping, leisure and other businesses themselves are very likely to need services provided by the offices and vice versa. The concentration of employment in the City Centre is also advantageous from a sustainability point of view because it reduces the need for separate journeys for these activities. The City

Centre's main shops, leisure and other facilities are in or near the High Street, Sidwell Street and Fore Street and are within easy walking distance of each other. The main focus is the High Street so an office location in this part of the Centre is preferable.

Proximity to other Employment

5.27 The location of offices close together makes access for clients and suppliers, joint working and sharing of facilities much easier. Again a location close to the High Street provides advantages because most of the City Centre's existing offices are in that area. In practice, offices have tended to be concentrated in particular parts of the Centre, most noticeably in Southernhay. This allows much closer interaction between businesses and enables clients to make use of a range of business services.

Secondary Requirements – All Sites

Size

5.28 The Review only covers sites that are 0.25 ha or more in area (see para 1.17). Therefore, it is unlikely that it will identify any sites that are too small to be suitable for many types of business employment use. This is particularly the case bearing in mind that there is considerable demand for small units and that even major offices can be accommodated on small sites in the City Centre because of the higher densities.

5.29 Nevertheless, larger sites do have advantages, especially where new development or redevelopment is proposed. On a larger site a greater range of businesses can be accommodated, businesses can benefit from grouping together and there are economies of scale in construction and management.

Prominence

5.30 For some, businesses, especially offices, the fact that their site can be seen by as many people as possible is important. Locations next to main roads leading to motorway access points are, for example, most desirable. In the City Centre sites that are readily seen from main pedestrian as well as vehicular routes are often preferred.

Quality of Surroundings

5.31 Many offices and some other types of employment seek locations that provide attractive surroundings and a positive context for their businesses. This is especially important to businesses needing a prominent location.

IT Connections and Power

5.32 Many types of business are heavily reliant on good IT connections. Exeter is generally well provided for but high speed broadband is not available throughout the City. Exeter is skirted by 132/275 kv power lines and is well connected to the National Grid such that it is anticipated that all potential power needs can be met in or near main employment areas.

Access from Housing

5.33 According to the 2001 census, 18.7% of Exeter residents normally walk to work. Businesses employing large numbers of people may benefit from a location within easy cycling or walking distance of concentrations of housing. Such a location is also desirable from a planning point of view as it reduces the need for travel to work by private car. In practice this is of most importance in the City Centre which is surrounded by densely populated housing areas. Businesses reliant on younger highly skilled people preferring an urban life style are likely to seek a City Centre location. Making employment available close to multiply deprived areas is especially desirable in order to foster social inclusion. The census areas where multiple deprivation is most significant are identified by Appendix B14.

Local Environmental Impacts

5.34 Special consideration is needed in situations where employment use of a site causes, or could cause, damage to the amenities and/or character of a housing or other vulnerable area. In most cases, employment uses in the City fit in reasonably well with other uses. However, sometimes conflicts arise associated with the traffic and parking needs of businesses. Occasionally processes undertaken by industrial undertakings within their premises cause noise and pollution and steps are needed to ensure that adjoining premises are protected. Industrial/warehouse development is likely to be inappropriate in areas which have special qualities arising from the design and character of buildings and landscape.

Secondary Requirements – All Sites other than City Centre Offices

Access to Public Transport

5.35 The availability of good public transport connections enables businesses outside the City Centre to attract staff who do not have access to a private car. The need for car parking is reduced. The reduction in the amount of traffic generated by the site is desirable from a sustainability point of view. Reduced peak hour congestion benefits businesses and the community as a whole.

5.36 The accessibility of bus stops and railway stations to employment sites, together with the range and frequency of services offered, are important. All existing services pass through the City Centre. Transfer to another service in the City Centre significantly increases overall journey times. Therefore good access to several

services is of especial benefit by raising the number of destinations that can be conveniently reached from the site.

Access to Shops and other Facilities

5.37 Employment sites within easy walking distance of shopping centres, restaurants and other facilities are often favoured by businesses, especially those with large numbers of employees, because of potential benefits to their staff and therefore recruitment. There are advantages from a planning point of view if the need to make separate shopping trips is reduced.

Proximity to other Employment

5.38 The benefits of grouping employment businesses together described in relation to City Centre Offices (see para 5.27) are also applicable to employment outside the City Centre but are less significant. This is because the density of employment is generally much lower so that travel between businesses is likely to be in a motor vehicle rather than on foot and can be quicker and distance is less important.

Secondary Requirements - City Centre Offices Only

Access to the Trunk Road Network

5.39 Although access to the trunk road system is not included as a primary consideration for the location of City Centre Offices, it is clearly important that sites are easily reached by road. Locations with best road links to M5 and A30 junctions and the Outer Bypass have particular advantages.

Summary

5.40 The table below lists primary and secondary requirements in relation to City Centre Offices and employment elsewhere.

Requirement	**City Centre Offices**	**Other Employment Areas**
Quality Accommodation	Primary	Primary
Car Parking	Primary	Primary
Access to Trunk Road Network	Secondary	Primary
Access to Public Transport	Primary	Secondary
Access to Shops and other Facilities	Primary	Secondary
Proximity to other Employment	Primary	Secondary
Size	Secondary	Secondary
Prominence	Secondary	Secondary
Quality of Surroundings	Secondary	Secondary
IT Connections and Power	Secondary	Secondary
Access from housing	Secondary	Secondary

6.0 SUMMARY OF FINDINGS

6.1 Appendix K provides an assessment of the suitability for employment of individual existing, proposed and potential employment areas and sites. The relevant section of the appendix is identified after each sub-heading below. Assessments are in relation to guidance provided in Section 5 above and Appendix J.

Zone I - Existing Employment Areas (K1)

6.3 Zone I employment areas (see para 5.24 and Plan 1) are within 1.5 km of motorway access points and therefore are most accessible to the trunk road system. There are two large employment areas, Exeter Business Park and Sowton (areas A & B on Plans 2 & 3 in Zone I). Both are modern estates with good quality accommodation and abundant car parking. Exeter Business Park is the more recent development and has yet to be fully completed.

6.4 Both areas also satisfy most of the secondary requirements that apply to employment areas outside the City Centre. Sowton performs slightly less well than Exeter Business Park. Both benefit especially from their combined size. Much of Exeter Business Park is prominent. Public transport access is generally reasonable. The main weakness is inaccessibility to shopping facilities.

6.5 The amount of vacant accommodation is considered to be reasonable bearing in mind the size of the areas concerned, and, at Exeter Business Park, the amount of recently completed floorspace.

Zone II - Existing Employment Areas and Sites (K2)

6.6 Peninsula Park and Pynes Hill (areas D&E, Plans 2 & 5) have especially good Zone II locations being on the Outer Bypass and within 2.5 km of M5 junctions. Peninsula Park and Pynes Hill are modern developments with good parking provision. Both have good secondary characteristics although access to Pynes Hill by public transport is weak. There is little vacant accommodation in either area but there is scope for further development at Peninsula Park.

6.7 The Pinhoe area (area C, Plans 2 & 4) also has a good Zone II location but is an older and rather more congested estate. It has strong secondary requirements including good access to public transport and shopping. The Pinhoe estate has few vacancies.

6.8 Marsh Barton and Matford (areas F&G, Plans 2 & 6) are together roughly the same size as Exeter Business Park and Sowton combined. They have similar vacancy levels and are, in general, equally successful. Marsh Barton, and to a lesser extent, Matford are likely to benefit from improved access to the A30 when the link between Grace Road and Alphington Road, proposed by the Local Plan First Review, is completed. Marsh Barton is the older of the two areas and this is reflected in higher densities, less planting and greater traffic and parking problems.

6.9 The BT Depot and the Garage and Showroom on Main Road, Pinhoe (sites 1 & 2 on Plan 4) are only just within Zone II. The accommodation they provide is relatively old. Primary requirements are met reasonably well but secondary requirements, mainly their isolation and limited size, raise doubts about their suitability as employment sites in the long term. There has been recent interest in redevelopment of the Garage and Showroom site for housing. A satisfactory redevelopment of either site for offices is possible but a modern industry/warehouse development would be difficult to achieve satisfactorily from a user and a planning point of view.

Zone III - Existing Employment Areas and Sites (K3)

6.10 Harrington Lane (area H, Plans 2&4) and Haven Banks/Water Lane (area J, Plans 2 & 7) are the only major employment areas within Zone III. In both cases access to the trunk road system is exceptionally poor, there are few modern buildings and secondary attributes tend to be weak.

6.11 Proximity of the Riverside area gives a potentially attractive outlook for development in the Haven Banks/Water Lane area but the existing employment uses do not currently capitalise on this potential. Two parts of the area, where small units are concentrated appear to be successful but there are larger parts that are underused and little cared for. Scope to improve road access to the area is limited. A new high capacity crossing of the busy Paddington to Penzance Railway line could be provided but the area would still be outside the zones with good access to the trunk road system. It is therefore difficult to argue that the Haven Banks/Water Lane area as a whole should be retained for employment if genuinely no longer required by the existing users.

6.12 On the other hand, a major improvement to the suitability of the Harrington Lane area, where there is a substantial amount of vacant employment land, does seem to be possible subject to flood risks being addressed. A main feature would be the provision of a new bridge over the railway connecting the area to Exhibition Way in the Pinhoe employment area, on the lines proposed by the Local Plan First Review policy E1. This would have the effect of bringing the whole area within 1 km of the Outer Bypass and parts within 2.5 km of M5 junction 29. It is anticipated that only a mixed housing/employment development would be viable but this would enable the primary requirements for good quality accommodation and appropriate parking provision to be met. A number of improvements to secondary characteristics would also follow including better access to public transport, shops and the Pinhoe employment area.

6.13 Whilst the smaller existing employment sites in Zone III do not have good access to the trunk road system many are occupied by well established businesses often meeting local needs. In many cases parking is sufficient, buildings are well adapted to what they require and significant secondary requirements are met. Examples include Wippells, Buller Road (site 4, Plan 7) Yeo and Davey (site 8, Plan 11) which are reasonably accessible and are well served by public transport and local shops. The Retreat Boatyard (site 9, Plan 10) is especially accessible for a Zone III site and benefits from exceptionally attractive surroundings.

Existing City Centre Office Areas and Sites (K4)

6.14 Plan 1 shows the extent of the City Centre. All City Centre sites are shown on Plan 8. The BT offices (site 18) are outside the City Centre as defined by the Local Plan First Review but, but because of their proximity to the boundary, are included for the purposes of the Review.

6.15 The majority of City Centre offices are in Southernhay (area M) which is close to the High Street making it highly accessible to public transport and shopping. The quality of accommodation and parking provision varies considerably but the area includes modern state of the art development. The size of the area and the concentrated form of development ensures that a very wide range of different businesses are within easy walking distance of each other. Secondary requirements, including accessibility to the road network, are also well satisfied. Vacancies are at a reasonably low level considering that additional accommodation has become available recently through re-use of existing buildings at the Former Royal Devon and Exeter Hospital and new development on the Western Way frontage.

6.16 The only other concentration of offices is in New North Road/Longbrook Street (area L). This area also meets primary requirements well, except in that the area is relatively small. Its location on a busy road in an area of mixed character compares unfavourably with the historic parkland that provides Southernhay with its setting. A significant proportion of office floorspace in this area has been converted into living accommodation and there is generally a fairly high proportion of vacant floorspace.

6.17 Given the evident weakness of the New North Road/Longbrook Street area as an office location, despite its central location and relatively modern accommodation, there must be doubts about the long term prospects for this area.

6.18 The nearby Rougemont, Castle Street area (site 14) is similar in size but comprises a limited number of buildings in extensive grounds. It is in a comparable location to Southernhay in relation to the High Street, but is much less accessible by road and tucked away behind shopping frontages. The former court house at Rougemont Castle is in use as a gallery, studios, residential and offices. A building on Castle Street is vacant. The area has particular heritage value and aesthetic quality suggesting that other uses might be appropriate.

6.19 Other existing offices close to the High Street and associated shopping and public transport facilities include National House, Queen Street and the Victorian terrace on the corner of Queen Street and Richmond Road (sites 12 and 13) and buildings on the south side of Mary Arches Street at its junction with Bartholomew Street East (site 16). The first two are further from the High Street but Queen Street provides a clear and direct connection to it. National House is a substantial 1970s building that has been vacant for some time. The Victorian terrace, on the other hand, is successful as a location for small offices. It is likely that it would be difficult to convert these listed buildings back into residential use. The Mary Arches Street site is fully occupied but there is a planning permission for conversion of part of it to housing.

6.20 St David's Hill (site 11), Clarendon House on Western Way (site 15), Renslade House (site 17) and the BT Offices on Commercial Road (site 18) are existing offices that are further away from the focus of the Centre and separated from it by significant

changes in level and/or a busy road. All except Renslade House comprise buildings that were built or adapted to meet the needs of a single user. Their future depends on the future requirements of the current occupiers and the existence of other businesses that may need similar premises. Conversion of these premises to residential may be difficult, most especially Clarendon House, which is a substantial roughly square 1970s building with high ceilings. There has been some interest in the conversion of the Commercial Road offices to residential in the past.

6.21 The 11 storey Renslade House is in a prominent location on the edge of what was once a large industrial/warehousing area that has gradually been redeveloped to provide housing. A recent planning permission for an extension has not been implemented, but vacancy levels are low and Natural England have recently moved into this building.

6.22 It would appear that businesses seeking City Centre offices are very selective. It is only the offices at Southernhay, which to a significant extent meet both the primary and secondary requirements together with premises designed specifically for businesses that occupy them, and buildings/sites that cannot easily be brought into another use, that are really successful.

Existing City Centre Employment Areas and Sites not predominantly in office use (K5)

6.23 The sites discussed in this section are in use for industry/warehousing or for a mixture of employment uses including offices. They are considered first in relation to the requirements identified for general employment use in Appendix J1. An assessment of the suitability of sites for office use is then considered, in relation to requirements identified by Appendix J2, where it is thought that this will significantly improve their suitability for employment.

6.24 The primary requirements for industry/warehousing identified in paras 5.19 – 5.22 and 5.26 are that it comprises modern premises with abundant parking and good access to the trunk road system. The City Centre is not well connected to the trunk road system. Very few buildings on these sites are recently built. Parking provision varies considerably. The trend in the past has been for industry/warehouse premises in the City Centre to be brought into other uses such as retail and housing. On the other hand it needs to be recognised that there may be some businesses requiring premises of this sort that have close functional links with the centre.

6.25 It is not considered that redevelopment of the BT premises on Queen Street (site 20), a substantial and specialized building, to provide offices would be viable. The site to the west of St David's Station (site 19) is a long distance from the High Street and fails therefore to satisfy the primary requirements of good access to public transport and shopping to be met. The site sandwiched between the station and railway tracks, in an unattractive, inaccessible and inconspicuous location.

6.26 The redevelopment of the Summerland Street area (area K, plan 8) appears to have the potential to provide office accommodation that meets all the primary and secondary requirements. A main concern is that, because redevelopment would only be viable if other uses such as retail and residential were included the office content

would not be large enough. This might be resolved by locating offices in a particular area or providing especially good pedestrian links between them. Southernhay is only 200 m to the south, separated from the Summerland Street area by the Bus and Coach Station (area T, plan 8) which is proposed for redevelopment to provide commercial leisure, retail and a new bus station by the Local Plan First Review. Inclusion of some offices in this development may enable links between offices in the Summerland Street area and in Southernhay to be improved.

6.27 The four remaining sites meet all the primary requirements for City Centre Offices other than proximity to other offices. However, the need to include other uses in any redevelopment tends to compound this disadvantage. Greatest potential would appear to be offered by West Street/Fore Street (site 23) and Tudor Street/Frog Street (site 24). Although separated, they are close to each other and to Renslade House (site 17) and Commercial Road (site 18). These sites (23 and 24) are prominent and reasonably accessible by road. The main disadvantages are a peripheral location within the Centre and somewhat unattractive surroundings despite their historic and architectural significance. There is scope to considerably improve the character of this area and it may be that redevelopment to provide offices could form part of a comprehensive effort to secure its renewal. Part of this might involve securing better use, including use as offices, of historic buildings in Fore Street/New Bridge Street. It may be that other opportunities to provide employment in the area should be explored, for example, by considering the potential of land adjoining at Bonhay Road, Tudor Street in leisure use (site I, plan 8).

6.28 The land on the north side of Mary Arches Street (site 21) and the land at Market Street (site 22) are both well located in the City Centre. They already include some office floorspace and could have some potential for redevelopment to provide new offices. However, their small size and isolation suggests that this would not be worthwhile.

6.29 Redevelopment of employment land to provide new offices in the City Centre should be considered further in the Summerland Street area and at the West Street/Fore Street and Tudor Street/Frog Street sites.

Proposed City Centre Office Areas (K6)

6.30 Proposals to provide offices in the City Centre are assessed in relation to the criteria set out in J2. The Local Plan First Review proposes redevelopment of the St David's Station Car Parks (area N, Plan 8) to provide approximately 7,600 sq m of office floorspace. This proposal was first made in 1990, there has been some recent interest and it has been identified as a priority site for intervention location by the Draft Devon Employment Strategy published by the Devon Economic Partnership. The site is some distance from the main body of the City Centre but is otherwise well served by public transport and local shops and there does appear to be scope to improve the quality of the surrounding area. A major requirement is that the station car parks are replaced in locations that are as convenient as at present for rail users. The isolated location coupled with the high cost of development suggests that the site will only come forward for office development as part of a mixed use development.

6.31 Planning permission was granted in 2003 for the provision of offices as part of a mixed development at Central Station Yard area (area P, Plan 8). The site meets all the primary requirements for City Centre offices except proximity to other employment. An appeal against refusal of planning permission to provide a hotel on the site was dismissed in 2008 on highway and amenity grounds. There is a small amount of employment accommodation at the same end of Queen Street although this includes National House (site 12, Plan 8), which has been vacant for some time.

6.32 It is suggested that both these proposals should be re-examined.

Proposed Employment Areas other than for offices in the City Centre (K7)

6.33 The Local Plan First Review proposes four areas for employment development outside the City Centre which have not yet been developed. Two of these (West of Ibstock Brickworks/Eastern Fields) are considered in relation to the adjoining Brickworks at Harrington Lane (area H, Plan 4) considered in 6.10 and 6.12 above. As redevelopment ensures that buildings are modern and meet prevailing parking standards, in all cases accessibility to the trunk road system is the only primary requirement that needs to be considered.

6.34 Land West of Exeter Business Park (area Q, Plan 4) is the remaining undeveloped portion of this business park and shares most of its advantages as an employment area. However, the site is less prominent than most of the park, being served off a cul-de-sac.

6.35 The land off the A379 (area R, Plan 5) is in Zone I with ready access to a spur road leading directly to junction 30 on the M5. All secondary requirements are satisfied with the exception of access to public transport and housing. Both are likely to be addressed as development of the surrounding area, mainly for housing, proceeds.

6.36 Both the land west of Exeter Business Park and off the A379 are most suitable for employment development.

Potential Employment Areas on Previously Developed Land (K8)

6.37 The Bus and Coach Station (area T, Plan 8) is a prime City Centre redevelopment site that is an attractive location for a range of uses including retail. It is a very suitable location for City Centre offices being close to the High Street and Southernhay (area M, Plan 8). Offices provided on this site might make office development at Summerland Street (area K, Plan 8) more viable by linking it to Southernhay. The land at Bonhay Road/Tudor Street is much less attractive for office development but may be suitable if this is undertaken as part of a comprehensive scheme with Tudor Street/Frog Street (site 24, Plan 8).

6.38 Access from the railway yards to the west of St David's Station (area S, Plan 8) and Exmouth junction (area U, Plan 11) to the trunk road system is unsatisfactory for general employment purposes. It is especially poor from the St David's Station land because of its restricted frontages to the public highway and the need to pass

through the City Centre or Exe Bridges to reach the Outer Bypass, the M5 or A30. It would also be difficult to provide the Exmouth junction area with satisfactory road access and connections to it from the nearest primary road are via indirect or poorly aligned secondary roads passing through housing areas. Both are reasonably large sites but lack prominence or attractive surroundings. The St David's area has the advantage of being next to the riverside area but this may restrict the type of development that would be allowed on it.

6.39 Bishops Court Quarry (area V, Plan 5) is very suitable as an employment site because of its location in Zone I Close to M5 Junction 29 adjoining Sowton. It would appear that the landscape has capacity to accommodate employment development here satisfactorily. It is a relatively low profile location accessed through an existing estate road. Public transport connections are good but it is a long way from any shops.

Potential Employment Areas on Greenfield Land (K9)

6.40 All the areas listed below are within zones I and II, and are likely to be suitable for employment development in principle subject to there being no planning objections or particular weaknesses in relation to secondary requirements.

6.41 All of the potential employment areas on greenfield land, with the exception of the Matford area (area Z, Plan 6) have been identified as being suitable for housing development in the Strategic Housing Land Availability Assessment (SHLAA). The selection of this land for employment as opposed to residential through the LDF is likely to depend on the demand for each use and the comparative suitability for each use, particularly in respect of impact on the landscape and adjoining areas.

6.42 According to the Landscape Sensitivity and Capacity Study (2007) all the areas identified have a high to medium capacity to accommodate employment development except land East of Monkerton (area W4, Plan 4) and St Bridget Nurseries (area X1, Plan 5) which have a low and medium/low capacity.

6.43 When selecting land for employment in an area where residential development is also expected it is important to consider how they will relate together. Detailed design can resolve most potential problems. The main exception is the impact of traffic, particularly heavy goods vehicles passing through residential areas to reach employment sites. To avoid this, employment areas should have access directly onto the primary road network or through an existing employment area.

6.44 The land at Honiton Road (area W3, Plan 4) and at Sandy Park Farm (area X2, Plan 5) are accessible to motorway junctions. Both are prominent, reasonably attractive, sites adjoining existing or proposed large employment areas. The Honiton Road site is reasonably well served by public transport but neither are near shops or other similar facilities.

6.45 Land at Monkerton (area W1, Plan 4), and parts of Hill Barton (area W2, Plan 4) are within Zone 1. The Monkerton area offers prominent, attractive, locations with reasonable public transport connections and parts are close to a supermarket. Road access to any employment provided at Hill Barton should be through Exeter

Business Park and/or the Honiton Road site. The need to reduce impact on the landscape and on amenities of existing housing also suggest that employment at Hill Barton should be concentrated on lower land close to the business park.

6.46 Land at Matford Park (area Z, Plan 6) is being actively considered for employment development as a continuation of the successful Matford estate. It has a good prominent Zone II location in an attractive setting and reasonable public transport connections. Development of the land is dependent upon the extent to which it is at risk from flooding and the way in which it may affect important wildlife habitats in and around the nearby Exe estuary.

6.47 The land north of Topsham Road West of the M5 (area Y, Plan 10) is only just within Zone II. It is moderately prominent in reasonably pleasant surroundings. Public transport connections are fairly good but there are no shops in the vicinity.

7.0 CONCLUSIONS

7.1 The Exeter Business Park, Sowton, Pinhoe, Peninsula Park, Pyne's Hill, Marsh Barton and Matford are good quality employment areas. Development for other purposes within them should be resisted to avoid damage to employment opportunities in the City.

7.2 Comprehensive regeneration of the Harrington Lane/Brickworks area including a substantial employment element should be encouraged. This should include the provision of a new road link between the area and Pinhoe Road via the Pinhoe Road employment area making use of vacant land already allocated for employment.

7.3 Southernhay is the prime City Centre office location and should be protected from the incursion of other uses if employment opportunities are not to be harmed.

7.4 The possibility of regenerating existing employment areas at Summerland Street, West Street/Fore Street and Tudor Street/Frog Street should be explored with a view to provision of a significant amount of new office floorspace.

7.5 Other identified existing employment sites should be retained in employment use unless it can be demonstrated that they are no longer required by their current occupiers and there is no local need for employment land to be retained on the site.

7.6 The Local Plan First Review proposal to provide offices at St David's Station should be re-examined as part of the preparation of the LDF to establish what mix of uses may be appropriate for this site.

7.7 The land to the East of Exeter Business Park and South of the A379 allocated for employment use by the Exeter Local Plan First Review are high quality employment locations. These allocations should be carried over into the LDF.

7.8 The Bus and Coach Station would be a very good location for City Centre offices and Bishops Court Quarry would be suitable for more general employment use. Other previously developed land, to the west of St David's Station and at Exmouth junction, are much less satisfactory because access to the trunk road system is poor.

7.9 Greenfield land at Monkerton, Hill Barton, Honiton Road, Sandy Park Farm, north of Topsham Road west of the M5 and, subject to flood risk considerations, at Matford are suitable for employment development.

7.10 These conclusions are set out in more detail by the table below:

Areas and sites which should be retained in employment use as fully as possible.

Name of Area or Site	No.	Plan No.
Exeter Business Park	A	2&3
Sowton Pinhoe	B	2&3
Peninsula Park	C	2&4
Pyne's Hill	D	2&5
Marsh Barton	E	2&5
Matford	F	2&6
Southernhay (City Centre Offices)	G	2&6
	M	2&8

Existing employment areas and sites where revitalisation should be encouraged including the provision of new accommodation for employment use.

Name of Area or Site	No.	Plan No.
Harrington Lane/Brickworks Area	H	4
Summerland Street Area (City Centre)	K	8
West St/Fore Street (City Centre)	23	8
Tudor St/Frog Street (City Centre)	24	8

Existing employment areas and sites where the loss of employment use would be considered if it has been clearly demonstrated that there are no longer good operational reasons for the businesses that occupy the site to remain there and there is no evidence of a need to retain employment opportunities in the area.

Name of Area or Site	No.	Plan No.
Haven Banks/Water Lane Area	J	7
New North Road/Longbrook Street (City Centre)	L	8
BT Depot Pinhoe	1	4
Garage Main Rd Pinhoe	2	4
Western Road, St Thomas	3	7
Wippells, Buller Road	4	7
Larkbeare, Topsham Road	5	7

Name of Area or Site	No.	Plan No.
Exwick Mill, St Andrew's Road	6	9
Laundry, Cowley Bridge Road	7	9
Yeo and Davey, Old Tiverton Road	8	8/11
Retreat Boatyard, Topsham	9	10
BT Building off Station Rd Topsham	10	10
St David's Hill	11	8
National House, Queen Street	12	8
Buildings at Queen Street/Richmond Rd	13	8
Rougement and Castle St	14	8
Clarendon House, Western Way	15	8
Mary Arches St, South	16	8
Renslade House, Tudor Street	17	8
BT Offices, Commercial Road	18	8
Premises West of St David's Station	19	8
BT Building, Queen Street	20	8
Mary Arches St North	21	8
Market St	22	8

Local Plan First Review employment proposals that should be re-examined as part of the preparation of the LDF

Name of Area or Site	No.	Plan No.
St David's Station Car Parks	N	8
Central Station Yard	P	8

Local Plan First Review employment proposals that should be included as proposals in the LDF

Name of Area or Site	No.	Plan No.
Land West of Exeter Business Park	Q	4
Land South of the A379	R	5

Areas which should be considered for additional employment development as part of the LDF

Name of Area or Site	No.	Plan No.
Bus and Coach Station (City Centre)	T	8
Bonhay Road/Tudor Street (with adjoining site)	I	8

Name of Area or Site	No.	Plan No.
Bishops Court Quarry	V	5
Monkerton	W1	4
Hill Barton	W2	4
Honiton Road	W3	4
Sandy Park Farm	X2	5
South of Sandy Park Farm	X3	5
Matford Park	Z	6

Areas which should not be considered for additional employment development as part of the LDF

Name of Area or Site	No.	Plan No.
Railway Land West of St Davids Station	S	9
Exmouth Junction	U	11
Land East of Monkerton	W4	4
St Bridget Nurseries	X1	5
North of Topsham Rd West of the M5	Y	10

Future Studies

7.11 The Review draws attention to the need for more detailed consideration of the scale and type of demand for new office floorspace in the City Centre. This should provide evidence of the potential demand for office accommodation of different types provided by new development or through redevelopment at the following locations identified by the review.

Name of Area or Site (All sites are shown on Plan 8)	No.
Summerland Street Area	K
West St/Fore Street	23
Tudor St/Frog Street	24
St David's Station Car Parks	N
Central Station Yard	P
Bus and Coach Station	T
Bonhay Road/Tudor Street (with adjoining sites)	I

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APPENDIX B: PROFILE

Introduction

B1 Exeter has a strategic location in the middle of the south west region with good rail and road links to London, the midlands and the north and is served by an airport with scheduled flights to a number of domestic and European destinations. It is the centre of an extensive rural area providing employment for around 91,000 people and has a population of 122,400. It is widely perceived to be a good place to work or live in because of its rural location, historic character and good communications. Main constraints on the long term creation of further employment opportunities are perceived to be a shortage of suitable land and traffic congestion.

Employment Structure

B2 The numbers employed in different sectors in 2006 are set out below:

Industry	Exeter Number	Exeter %	England & Wales %
Agriculture, fishing, energy and water	1,770	2.0%	2.3%
Manufacturing	3,895	4.4%	4.4%
Construction	3,928	4.5%	4.5%
Distribution, Hotels & Restaurants	17,846	20.3%	20.3%
Transport and communications	5,723	6.5%	6.5%
Banking, finance and insurance etc.	16,299	18.5%	20.3%
Public administration, education & health	35,027	39.8%	18.5%
Other Services	3,627	4.1%	4.1%
Total	**88,114**	**100.0%**	**100.0%**

Source: ONS Annual Business Inquiry (ABI) 2006

B3 Within the totals above the employment is especially high in health and social work; retailing; public administration; business and professional services; communications and gas supply. 37% of Exeter employees work part time compared with 31% nationally.

B4 The amount of employment in 2004 within the Exeter Travel to Work Area in key sectors as identified by the Regional Economic Strategy is as follows:

Sector	Number employed
Advanced Engineering	688
Biotechnology	118
Environmental Technologies	1,443
Food & Drink	1,183
Information Communication Technology	3,835
Marine Technologies	690
Tourism and Leisure	6,105
Science and Knowledge	11,681

B5 The table below gives an indication of the size of businesses in terms of numbers of employees.

Area	1-10	11-49	50-199	200+
Exeter	77.9%	16.5%	4.6%	1.0%
England &Wales	84.5%	12.0%	2.8%	0.7%

Source: ONS Annual Business Inquiry (ABI) 2006

B6 Most significant employers are:

- the Meteorological Office;
- the Royal Devon & Exeter Hospital;
- the Devon & Cornwall Constabulary HQ;
- Flybe;
- EDF Energy;
- South West Regional Development Agency HQ; and
- the South West Regional Chamber of Commerce.

B7 Tourism in Exeter supports around 3,700 jobs (4.2% of the total) and generates £149 million per annum, but the scale and number of attractions in the City limits its ability to take more advantage of the south west tourism market.

B8 11.5 % of the economically active population of the Exeter Travel to Work Area is self employed according to the 2001 Census. The percentage is somewhat lower in Exeter.

B9 In 2007, according to the Valuation Office Agency (2005 Revaluation), the City contained the following employment accommodation:

	no of units	sq m floor area
Offices	1,209	373,000
Factories	339	239,000
Warehousing	719	487,000

B10 According to the above source Rateable Values in £ per sq m were as follows:

Area	Offices	Factories	Warehouses
Exeter	£82	£34	£42
Devon	£59	£26	£29
SW	£85	£28	£35
SE	£110	£40	£52
E&W	£120	£28	£39

Source: Valuation Office Agency, 2007 (Property Market Report)

B11 Gross Value Added (GVA) per person in employment in Exeter is roughly in line with that for the region.

B12 The University of Exeter has a highly respected research centre specialising in nanotechnology which provides opportunities for the development of a concentration of interconnected businesses, or cluster, focusing on biotechnology.

Skills, Capacity & Aspirations

B13 67.7% of the population of Exeter is of working age compared with 62.1% nationally but the economic activity rate is 78.2% slightly below the national average (78.6%). Exeter has lower than average income levels and is ranked 15 out of 45 south west districts in that 20.5% of the population is classed as having particularly low levels of income. At local level, some communities have almost 50% of individuals and families affected by very low income. This causes particular problems because house prices in Exeter are very high.

B14 Unemployment (claimants) levels are relatively low but the rate varies across the City with some areas experiencing rates that are substantially higher. Higher levels of deprivation affect Sidwell Street/Clifton Road and the Burnthouse Lane Trees & Rifford Road Super Output Areas (SOAs), all falling amongst the 10% most deprived nationally. The Chestnut Road area has benefited as a result of regeneration initiatives such as the Government's Single Regeneration Budget.

B15 Skills levels within the City are higher than the national average but the city lacks a strong presence in many higher-level business services and especially in knowledge-based industries. As a result it fails to retain many graduates from the University of Exeter. According to the ONS Annual Population Survey, 30.0% of the working age population in 2007 was educated to degree level and 56.3% to A Level. Equivalent figures for England and Wales are 28.1% and 45.9%

APPENDIX C: TRENDS

General

C1 Within the City's Travel to Work Area, employment growth and increases in the gross value added contribution have broadly followed the regional trend over the past ten years although there is evidence of a recent acceleration.

C2 Exeter, in particular, has seen major growth in employment especially in the service sector. Levels of productivity are now significantly above both the national and regional average. A substantial growth in its working age population has driven and reinforced the strong economic performance. The attractiveness of the City to key employers in particular has increased and it now houses a number of national and regional headquarters and become a major focus for the knowledge economy.

C3 The number of jobs in Exeter increased by 40.8% between 1998 and 2006 according to the ONS Annual Business Inquiry. Unemployment in the City dropped from 5.8% of the economically active population to 2.8% between 1991 and 2001.

Commitments

C4 The Princesshay retail development has substantially improved the retail offer of the City Centre. Proposals are being brought forward for a new settlement; a strategic employment site (Skypark), a science park and an Intermodal Freight Terminal close to Exeter in East Devon. There are plans for the continuing expansion of the Exeter Airport.

Training and Innovation

C5 A fundamental reorganisation of the state education system in Exeter involving substantial new buildings has been completed. Exeter College, one of the largest tertiary colleges in the country, is expanding its role and modernising its facilities. Although the Exeter College of Art and Design, part of the University of Plymouth, has closed, the University of Exeter has grown substantially in recent years and plans to increase student numbers from 11,000 to 16,000 by 2016. The University recently set up the Peninsula Medical School in the City in partnership with the University of Plymouth and the National Health Service.

C6 An Innovation Centre has been established at the University and has been recently expanded. Links are being forged between the University, with its involvement in nanotechnology and other research, and key knowledge based institutions such as the Met Office aimed at stimulating growth of small enterprises, some of which have come into being at the Innovation Centre.

Changes by Employment Sector

C7 The table below shows changes in the number employed in key sectors between 1996 and 2004.

Key sector	% of EHOD jobs in Exeter TTWA	Exeter Heart of Devon Employment Area			South West % change p.a
		Number of jobs 2004	Change 1996 – 2004		
			% per annum	No. of jobs in period	
Advanced Engineering	62.4	1,102	- 9.8	- 1,403	- 2.4
Biotechnology	76.6	154	-14.2	- 368	+4.4
Creative Industries	83.1	5,904	+9.8	+ 3,102	+1.5
Environmental Technologies	77.2	1,869	-8.0	-1,777	-3.6
Food & Drink	21.4	5,539	-6.7	-3,438	-2.7
ICT	87.1	4,403	+6.5	+1,747	+1.6
Marine Technologies	51.0	1,352	+45.0	+1,283	+4.6
Tourism and Leisure	69.9	8,737	+1.3	+880	+1.1
Science and knowledge	79.0	14,783	+2.4	+2,583	+0.2

Source: ONS ABI TTWA = Travel to Work Area

Land and Buildings

C8 The table below records the amount of land available with planning permission for employment development and the amount of employment development that took place in each year since 2000.

		Year up to 1st April							
		2001	2002	2003	2004	2005	2006	2007	2008
Unimplemented Planning Permissions*	Ha	71.69	61.65	53.85	35.84	23.56	23.42	19.62	13.59
	Sq M	201653	181086	192909	141807	97107	75844	64570	45620
All Completions*	Ha	6.78	10.36	7.21	22.79	11.13	3.28	1.87	6.80
	Sq M	19473	29443	22804	64535	39038	32805	7107	179373
City Centre Completions	Ha	-	0.1	-	-	0.58	0.59	-	0.31
	Sq m	-	1032	-	-	8240	26299	-	7788

Source: Exeter City Council, Employment Planning Permissions and Completions (published on an annual basis). *Includes land not counted against Structure Plan requirements.

In the 5 years up to April 2008 some 3.4 ha of employment land, comprising isolated sites of 0.25 ha and over outside the main employment areas, were re-developed for housing. This does not include the 3.5 ha Ibstock Brickworks site Monk's Road, redeveloped in the same period, which included extensive mineral workings as well as the factory.

Recent Trends

C9 According to UK economic indicators published in January 2009, the UK economy formally entered a recession with a 1.5% decline in the final quarter of 2008 following a 0.6% fall during the third quarter. This was lead by declines in production and construction. Consumer prices rose by 3.6% reflecting sharp increases in the price of fuel and food. Inflation has fallen sharply back since. The Sterling exchange rate weakened sharply against both the Euro and the US dollar in 2008. The volume of non-food retail sales fell in the second half of the year. The proportion of the UK working age population in employment decreased in the first three quarters of 2008. Unemployment increased by 0.7 percentage points to 5.9% over the same period.

C10 Despite a substantial increase in exports the percentage of working age population in employment in the South West Region dropped by 0.6 percentage points in the first three quarters of 2008. Unemployment increased from 3.6% to 4.2 % in the same period but remains well below the national average. The Claimant Count Rate increased slightly. Over the period January to August 2008, the on-flow of claimants in the South West increased by 29% (an extra 3,500 new claimants per month) compared with the UK average of 24%.

C11 Most recent ONS reports indicate that the Exeter Claimant Count increased from 1.2% in January 2008 to 2.2% in January 2009. A proportionately large increase but the rate remains well below the national level. Work place salary levels increased by 4.6% in 2008 at roughly the same rate as in England and Wales. Roughly 40% of employers responding to an Exeter Chamber of Commerce Survey in December 2008 anticipated a fall in sales, margins and cash flow. That is more than twice as many respondents than those anticipating an increase.

C12 SWRDA commissioned Experian to explore possible alternative scenarios for the future development of the region's economy. These suggest that, under the most likely outcomes the regional economy would return to previous growth trends by 2012.

APPENDIX D: POLICY

Government Guidance

D1 The Government sets out its overall economic development policies in Planning Policy Statement 1 (PPS1), published in February 2005. It says that it is committed to "promoting a strong, stable, and productive economy that aims to bring jobs and prosperity for all". It advises that, in this connection, planning authorities should

- ensure that suitable locations are available for industrial, commercial, retail, public sector (e.g. health and education) tourism and leisure developments, so that the economy can prosper;
- provide for improved productivity, choice and competition, particularly when technological and other requirements of modern business are changing rapidly;
- recognise that all local economies are subject to change; planning authorities should be sensitive to these changes and the implications for development and growth; and
- ensure that development plans take account of the economic strategies of RDAs, regional housing strategies, local authority community strategies and local economic strategies…..

D2 Planning Policy Guidance Note 4 (PPG 4): Industrial, Commercial Development and Small Firms, published in November 1992, is the current detailed planning guidance on employment. Its main provisions are included in Draft PPS 4, Planning for a Sustainable Economic Future, its proposed replacement, This advises local planning authorities to ensure that a good supply of high quality land and buildings of different types is available. The aim should be to offer a range of opportunities for creating new jobs, meeting changing needs and demands whilst avoiding, or if not possible, mitigating against, adverse impacts on the environment. Planning policies should be flexible so that they respond to economic change and the need for co-ordination with infrastructure and housing provision. Plans should aim to meet the needs of existing sectors of the economy as well as new or emerging sectors.

D3 Priority should be given to the use of previously developed land especially vacant or derelict buildings (including historic buildings). Sites for larger office developments should be sought in or on the edge of town centres consistent with the sequential approach in Planning Policy Statement 6, "Planning for Town Centres", whilst recognising that market demand will influence office location. Opportunities for smaller scale office development should be promoted taking account of local circumstances and wider benefits that may arise from the proposal.

D4 PPS 6 includes offices as a town centre use. It encourages the promotion and enhancement of existing centres, focusing new development within them and planning for their future growth. A sequential approach is sought when seeking sites for town centre uses. First priority is given to existing centres followed by edge of centre locations and then out of centre sites that are well served by a choice of means of transport.

D5 Government guidance on transport provided by PPG 13 advises that employment should be accessible to modes of transport other than the private car and that major generators of travel demand should be focused on town centres and major public transport interchanges. It draws attention to the opportunities provided by information and communications technology to reduce the need to travel. Wherever possible, freight should be transported by rail or water. Activities that unavoidably generate a lot of freight movements by road should be located away from central and residential areas and have adequate access to trunk roads.

D6 Department of Transport Circular 02/2007 makes it clear that the capacity of the road system will not be expanded to meet demand. Development which generates a lot of traffic will not be acceptable in some locations. Measures to discourage car use will be essential. Developers will be expected to fund improvements to the highway network made necessary by their proposals.

South West Regional Spatial Strategy (SWRSS)

D7 The Regional Spatial Strategy for the South West incorporating the Secretary of State's proposed changes was published in July 2008. It promotes a switch from employment-led to productivity-led growth. This is to be achieved by:

- guiding investment to locations where it will have the maximum benefit in reducing the need to travel; reflect the economic importance of the larger urban areas foster sustainable communities and secure the regeneration, restructuring and diversification of the economy;
- ensuring there is a range and of appropriate sites to meet business needs, including those of smaller firms, to cater for both organic growth and inward investment;
- promoting innovation and the development of the knowledge driven economy by harnessing the potential of higher and further education Institutions, hospitals and other knowledge intensive institutions and by supporting the development of science parks, innovation centres and incubator units:
- supporting the development of key established and emerging business sectors, including clusters of related activity and other key sectors of importance sub-regionally; and

- recognising the role of non B use class sectors, including health, leisure, tourism and education as key employment generators; and the contribution of mixed-use development to employment supply.

D8 It advises that the supply of employment land should be critically reviewed on a three year rolling basis so as to ensure that allocations continue to meet current and longer term economic development needs. Sites which no longer meet the needs of business or are poorly located for economic development purposes should be considered for redevelopment for alternative uses in the following sequence:

- for non-B use class employment generating uses;
- for mixed use re-development including residential use taking account of the potential for higher employment densities; and
- for residential use only.

D9 It identifies the central areas of the SSCTs as the main focus for new investment in retail and other major facilities requiring high levels of accessibility to the communities they serve. They are seen as the prime location for office development (B1a), which is not related to other commercial uses. The planning of office development at other employment development areas should reflect the need to avoid putting at risk any approved Local Development Documents for a city or town centre.

D10 It proposes provision of about 40 hectares of employment land within Exeter's urban area, about 100 hectares adjacent to Exeter (in Exeter and in East Devon) and about 20 hectares in East Devon.

Devon Structure Plan

D11 The Devon Structure Plan 2001 – 2016 proposes 150 ha of employment land at Exeter of which 85 ha would be in Exeter and the remainder in East Devon

Exeter Local Plan First Review

D12 The Exeter Local Plan First Review 1995 – 2011 adopted in March 2005 provides for 113.5 ha, including, in addition to completions and permissions, proposals for development at:

South of the A379,
Exeter Business Park
Pinhoe
St Davids Station.

D13 Policy E3 states that:

> THE LOSS OF EMPLOYMENT LAND OR BUSINESSES WILL NOT BE PERMITTED WHERE IT WOULD HARM BUSINESS OR EMPLOYMENT OPPORTUNITIES IN THE AREA

D14 Other policies provide for research and development on the University of Exeter campus (Policy E4) and small scale appropriate business use in residential areas (Policy E5).

APPENDIX E: OBJECTIVES

Exeter Community Strategy (Exeter Vision)

E1 Exeter's Community Strategy is set out in the Exeter Vision. Important aims of the vision are to promote sustainable investment and maximise opportunities enabling all people to achieve their full potential. The employment focus is on encouraging business investment, improving education and training, and promoting tourism. It encourages positive help and support to initiatives promoting job retention and creation, attracting high quality employment, addressing lower educational attainment, and helping people in low-paid jobs. The vision acknowledges that, with a buoyant local economy, land supply is a potential problem in the long term. Exeter Vision proposes the following short-term actions to generate more inward investment and growth:

- develop an Exeter science/technology park which has strong connections to the University of Exeter and provision of an 'anchor' R&D facility;
- expand the University of Exeter's Innovation Centre and strengthen the professional support network;
- broaden the range of business support available via the Heart of Devon Enterprise Agency, and create additional managed workspace and offices across the area, and develop the potential for social enterprise businesses.

Exeter and Heart of Devon Economic Development Strategy

E2 The Exeter Heart of Devon Partnership comprises key stakeholders concerned with the economy of the Exeter sub-region consisting of Exeter, East Devon, Mid Devon and Teignbridge. The following proposals, affecting the type of sites and buildings required, appear in the economic development framework forming part of the Economic Development Strategy for 2005-2008 prepared by the partnership:

A promote investment in key economic sectors and provide knowledge-based jobs for the sub-region's increasing population. Key economic sectors requiring employment land identified are:
- ICT;
- professional & business services;
- biotech, medical & healthcare research;
- environmental technology;
- small scale advanced engineering;
- knowledge based public sector activities;
- arts and creative industries, and
- food and drink.

B identify and realise new employment land and premises opportunities particularly to meet longer term strategic as well as existing business needs including a review of the quality and suitability of existing employment land allocations and proposals by:

- considering the need for public sector intervention if demonstrable market failure;
- defining a joint site development and phasing framework to meet a range of business and industrial activities for the period up to at least 2008 (including priority sectors, Small and Medium Sized Enterprises [SMEs] and local services);
- prioritising which additional land should be made available to help serve the Exeter Principal Urban Area (and other towns covered by the partnership) in the period up to 2012;
- establishing a monitoring framework to measure take-up, location and type of development / occupier, location and change of use for alternative purposes;
- informing the South West Regional Development Agency (SWRDA) of priorities and need (supported by initial project appraisal), and
- the packaging together of any funding bid.

C encourage the provision of a balanced and diverse portfolio of jobs to meet the varied need of workers in the sub-region.

City Council Strategies

E3 Several City Council strategies supporting the vision are relevant to employment:

Arts and Media: This strategy includes the objective of encouraging arts and media organisations to develop and promote digital/electronic media projects;

Cultural: Supports the Exeter Vision aim of making the City a major cultural centre in the region and draws attention to the economic benefits that this can be expected to bring, and

Tourism: The strategy includes a strategic objective to maximise the economic benefits and employment opportunities from tourism.

APPENDIX F: FUTURE REQUIREMENTS

F1 Studies undertaken to inform regional and local employment policies and strategies are summarised below insofar as they give advice on the kind of buildings and sites that will be required to meet Exeter's long term employment needs. Most recent studies were completed before a recession was anticipated.

Spatial Dynamics of Change in the Key Sectors (SWRDA, February 2005)

Anticipated Change in key Sectors

F2 This study draws attention to the implications for change in key sectors of the regional economy (accounting for 17% of its employment). Results are summarised below:

- Advanced Engineering. A decline in demand for large automotive and aerospace plants may be partly offset by demand for high value manufacturing/research premises.

- Food & Drink. A short term growth in employment in secondary food processing is anticipated. As food production becomes more automated employment in this sector is likely to decline and to require less space.

- ICT High growth is expected, especially in software development and ICT services rather than manufacture. Demand for offices with high bandwidth infrastructure will be required rather than industrial sites and premises. The demand will be for good quality smaller sites.

- Creative Infrastructure. Part of the need will be for inner-city, urban warehousing and Victorian conversions. There will also be demand for sites on the edge of town business parks.

- Biotechnology This sector requires very specialised premises offering bio-security, physical security, appropriate facilities such as wet rooms and clean rooms as well as high bandwidth capacity infrastructure. These businesses prefer to cluster in areas where there are complementary activities such as a university or pharmaceutical companies. A science park location is typically required.

- Environmental Technology There is potential for growth in this sector. Site requirements vary greatly. Some will be consultancies requiring offices. Businesses are likely to be dispersed throughout the region.

Local Implications

F3 The anticipated employment change in these key sectors in Exeter and Torbay are:

Type of Employment	Number of Jobs
Advanced Engineering	- 700
Food & Drink	- 1,500
Information and Communications Technology	+ 1,600
Creative Industries	+ 1,700
Biotechnology	+ 1,200
Environmental Technology	+ 1,500

South West Town Centres Regional Study (DTZ Pieda January 2006)

Estimates for Exeter

F4 A requirement for an additional 90,000 – 110,000 sq m of office floorspace in Exeter is suggested accommodating around 4,800 to 6,000 workers assuming projected densities averaging 18.5 sq m per person.

Main Issues

F5 The study notes that most recent office development in Exeter has been out of town rather than in the City Centre. To reverse this to accord more closely with Government guidance will require a substantial change of policy and be difficult to achieve because of current commitments and the perceived lack of opportunities in the City Centre. At a more general level recent office demand has clearly favoured out of town locations despite some concerns about the lack of facilities serving them. There is a danger that policies directing offices to the City Centre will discourage office development from taking place in the City altogether.

Economic Potential in the South West (Roger Tym & Partners, March 2006)

Realising Economic Potential

F6 The study concludes that the critical ingredients in terms of realising economic potential are:

- diversity of economic structure – good representation in growth sectors but not over reliant on any particular one;
- connectivity including location relative to strategic transport infrastructure;
- concentration of high value added, knowledge intensive sectors, businesses and institutions;

- a highly skilled and adaptable workforce, and
- an entrepreneurial culture with high rates of business formation.

Predictions for Exeter

F7 An additional 22,300 to 28,500 jobs are anticipated in the Exeter TTWA up to 2026 roughly retaining its share of the regional total. Specialisation in several growth sectors (computing, retail, insurance) is low. If this was improved, the competitiveness of the local economy would be improved and the number of jobs it could support increased. Growth sectors include other business services, miscellaneous services, distribution, electronics, transport and communications. Important issues are the lack of evidence of high tech development in the M5 corridor and the prominence of the food and drink sector.

F8 The effect on Exeter is not clear. Miscellaneous Services are more strongly represented outside the City although Other Business Services are significant within the City. About 60% of new employment in the TTWA is likely to locate in the urban area despite the fact that that there are major employment generating developments in the pipeline to the east of the City. Future aspirations for Exeter include further establishing the reputation of the City as the capital city for the region and developing additional facilities to support this claim.

The South West Regional Economic Strategy (SWRDA May 2006)

Predictions for the Region

F9 The strategy predicts a decline in manufacturing, especially on a large scale, although not as fast as in the UK as a whole. It reports clear evidence of smaller scale specialist manufacturing increasing in some areas. Only 17% of office stock within the South West has been built over the period 1991-2003. A number of key and emerging sectors that account for 17% of the regional economy by employment and 22% of the regional economy by GVA are identified: These Key Sectors are:

<u>Current sectors:</u>

- Advanced Engineering, including Aerospace;
- Food and Drink;
- ICT, and
- Marine Technology.

<u>Emerging sectors:</u>

- Creative Industries;
- Biotechnology, and
- Environmental Technology;

Key non-industrial 'B' use classes that make a significant contribution to the supply of employment across the region are listed as:

- Health,
- Education, and
- Leisure/Tourism.

F10 The scale of growth projected in key sectors up to 2026 are:

Activity	% Growth
Other business services	16
Professional services	15
Computing services	14
Miscellaneous services	7.5
Insurance	3
Supporting other activities	2

Recommendations for Exeter

F11 The Regional Economic Strategy recommends that the City should:

- develop a stronger knowledge-based employment structure in order to further shift its economy towards high growth, high value added sectors;
- facilitate growth in electronics, transport communication and other business services;
- provide targeted programmes to address poor skills levels in parts of the urban area, and low take up of basic and advanced ICT service solutions;
- utilise the knowledge-based institutions located in Exeter including the University, Meteorological Office and Peninsula Medical School as key economic drivers;
- support innovation by developing a pro-active strategy that provides business support (including SMEs) and advice;
- deliver sustainable land and sites, including a science park and innovation centre, for future development, especially for high growth SMEs and innovative businesses;
- ensure economic development activities act as a driver for improvements in performance and participation in deprived wards (e.g. Wonford) and rural areas;
- improve the retention of graduates by delivering a community where young people want to live as well as work;
- invest in cultural, sports and leisure facilities and events as a way of achieving this;
- improve rail connectivity to London, the South East and east of Exeter;
- put transport measures in place to tackle congestion and support growth, particularly to the east of Exeter;
- ensure a better co-location of jobs and homes; and

- build on the recent strong performance of the City by further enhancing its image and ensuring economic linkage with Torbay, Newton Abbot and rural areas.

The Demand and Supply of Employment Land, Sites and Premises in South West England (DTZ Consulting & Research, January 2007)

Exeter Requirement

F12 The Exeter TTWA is seen as having particular advantages because of its location at the end of the M5 and good rail links. It is estimated that by 2026 it will require an additional 90 ha of employment land made up of:

Offices	193,000 sq m	11 ha
Other business space		30 ha
Warehouses		34 ha
Non B use class		15 ha

Investment, Intervention and Inter-relationships in the South Central Zone (Ekos Consulting February 2007)

F13 Exeter is presented as the 'prominent global player' in the South Central Zone of the South West Region comprising Exeter, Newton Abbot, Torbay, Plymouth and surrounding rural areas. It is expected to grow faster than the other towns in the future and there is concern that, although this has benefited the sub-zone in the past, it may not do so in the future. The study advocates measures to redistribute growth to address this. Exeter has better growth potential than the other towns because high growth sectors are well represented in its economy; it has a better qualified work force; a university and good employment land supply. There are, however, a number of challenges.

F14 The expansion of this high growth sectors will have to continue but, because of an only moderate business start-up rate and other reasons this might be difficult; The skills of the workforce will have to continue to enable necessary productivity gains to be secured; and innovation and R&D performance will have to be improved. In their view a productivity driven as opposed to employment drive strategy would continue to meet the need for lower skilled jobs required by the city to meet problems of unemployment and deprivation.

Exeter Employment Study (Atkins, March 2007)

F15 Atkins consider that the RSS underestimates the amount of employment that might be generated by the City but conclude that the land allocations are probably right. Part of the increase they forecast is in public sector employment that is difficult to anticipate.

F16 The study emphasises that there is currently a severe shortfall in the supply of land that will have a longer-term impact on the City unless it can be addressed quickly.

F17 The table below estimates likely growth in employment by sector up to 2026.

Sector	**Change in no of jobs**
Agriculture and fishing	-32
Energy and water	-365
Manufacturing	+378
Construction	+2,770
Distribution (including retail, hotels & restaurants)	+10,724
Transport & communications	+ 2,630
Banking, finance & insurance (Business services)	+ 10,068
Public sector	+ 9,547
Other services	+1,342

F18 They anticipate the following distribution of additional employment space in B class uses by 2026 in the Exeter SSCT and TTWA.

Type of employment	**SSCT**		**TTWA**
	Area in Ha	**Floorspace in sq m**	**Area in Ha**
1a Offices (Town Centre)	6.0	60,000	7.3
1a Offices (Business Park)	45.2	135,600	59.2
1b (Research and Development)	5.2	18,200	5.2
B1c (Light Industrial)	12.0	42,000	17.2
B2 General Industrial	5.9	20,650	8.9
B8 Warehousing and Distribution	43.6	170,400	52.7
Total	117.9	446,850	150.5

APPENDIX G: CURRENT MARKET REQUIREMENTS

G1 A number of sources are considered in turn with a view to understanding demand for premises of different types. The information provided was collected before the current recession. More recent material is available from the Enquiries Register but has not been used because of concern that they reflect abnormal conditions.

Enquiries Register

G2 Only some inquiries recorded by the Council's Inquiries Register are specific about what is required or the location preferred.

G3 Inquiries received seeking accommodation in Exeter are summarised below by type of business.

Sector	1/10/06 to 1/10/07		1/10/07 to 1/10/08		1/10/07 to 11/05/09*	
	No	%	No	%	No	%
Offices	308	61.5	216	48.8	93	46.3
Light Industry	172	34.3	218	49.2	108	53.7
Warehouse	15	3.0				
Investment	6	1.2	9	2.0		
Total	501		443		201	

* 7 months only.

Offices by Size

G4 The table below summarises inquiries for office units in the City of differing size, where size was specified, in the year up to 1 October 2007.

Size Range		Number	%
In sq m	In sq ft		
100 to 200	1075 to 2150	77	34.7
200 to 500	2150 to 5375	60	27.0
500 to 1000	5375 to 10750	43	19.4
1000 to 1500	10750 to 16125	18	8.1
1500 to 2000	16125 to 21500	5	2.25
2000 to 10,000	21500 to 107500	9	4.05
Over 10,000	Over 10750	10	4.5
Total		222	100

Other uses by Type and Size

G5 Size requirements, where known, of other B1 use enquiries for premises in Exeter for the year up to October 2007 are tabulated below:

Size Range		**Light Industrial**		**Warehouse**	**Total**	
In sq m	**In sq ft**	**No**	**%**	**No**	**No**	**%**
100 to 200	1075 to 2150	17	16.0	2	19	16.1
200 to 500	2150 to 5375	27	25.5	0	27	22.9
500 to 1000	5375 to 10750	25	23.6	5	30	25.4
1000 to 1500	10750 to 16125	15	14.2	2	17	14.4
1500 to 2000	16125 to 21500	9	8.5	2	11	9.3
2000 to 10,000	21500 to 107500	10	9.4	1	11	9.3
Over 10,000	Over 10750	3	2.8		3	2.6
Total		106	100	12	118	100

South West Town Centres Regional Study (DTZ Pieda, January 2006)

G6 The study advises that modern office occupiers, especially high value occupiers, tend to seek premises that:

- are highly accessible;
- provide quality space;
- have good communication linkages – ICT, access to Universities;
- have high quality landscaping and infrastructure;
- a prestige location; and
- a good quality surrounding environment..

Many existing buildings are perceived to be outmoded because of advances in IT technology although the advent of 'wireless' systems may negate this problem.

Economic Potential in the South West (Roger Tym & Partners, March 2006)

G7 The consultants consider the key employment issues affecting Exeter are:

- an under-developed knowledge based employment structure;
- a shortage of readily available land and premises;
- a shortfall of incubator & expansion facilities for high growth SME's;
- a shortage of sites and premises for indigenous industry;
- concentrations of deprivation including poor skills levels;
- a low take up of basic & advanced ICT solutions;
- low levels of graduate retention;
- perceptions of congestion, and
- that east-west accessibility is reduced by the constraints of the A30 and A303.

Spatial Dynamics of Change in the Key Sectors (SWRDA, February 2005)

General

G8 This study advises that the high quality of skills generated by the University of Exeter is encouraging investment in the scientific, hi tech research and development sector providing a diverse employment mix of high quality jobs. Office employment is driven by some relatively large professional firms many being part of national organisations. High standards of accommodation are required in high profile locations.

Offices

G9 The City Centre is primarily associated with small professional offices in period buildings or refurbished second hand buildings. The requirement now, arising from efficient working practices, is for open floor plan layouts, air conditioning and good IT network access. Corporate image and presentation are important to many Exeter businesses. There is pent up demand for out of town office locations because of the limited supply in the City Centre.

G10 The study concludes that there is potential for:

- national UK wide footloose demand including Government 'Lyons' relocations;
- growth in the service sector for provision of finance, IT, design, recruitment and training;
- expansion in the charity sector;
- upgrading demand from existing occupiers;
- rationalisation arising from converging occupiers should economy change;
- overspill demand from Taunton and maybe Bristol;
- relocation demand –displaced from redevelopment sites particularly as City Centre proposals come forward; and
- new demand arising from strong interest in creation of new businesses.

South West Central Zone – Employment Overview (Vickery Holman November 2006)

Offices

G11 The study advised of the following level of enquiries for office premises:

- daily enquiries for:

  premises up to 100 sq m from start up businesses and SMEs upgrading the quality of their premises and from charities, professional offices and consultancies;
  premises from100 – 500 sq m temporary lets from regional offices of national companies, health care and local authorities;

- monthly enquiries for:
  premises up to 1000 sq m from health care/local authorities;

- quarterly enquiries for
  premises of over 1000 sq m from call centres,
  national government and regional legal professional offices;

- current requirements from
  10 potential occupiers for office space up to 500 sq m - total 3,500 sq m
  10 businesses looking for premises over 500 sq m in extent - total area 25,000 sq m

Industrial Premises

G12 There has been recent growth in trade and distribution related businesses. This arises from the growth in population in Devon and Cornwall and the need to improve the retail delivery network at present serviced from Bridgwater and Bristol. Large regional distribution centres are likely to become more common requiring sites of 2-3 ha.

G13 Demand exists for the upgrading or rationalising of accommodation, overspill relocation and for new businesses but not for UK wide footloose national distribution centres because of lack of large sites with motorway access.

G14 Inquiries for industrial premises are at the following level:

- daily: up to 100 sq m from small and medium enterprises (SMEs) start ups and small scale expansion;
- weekly: 100 to 500 sq m for business users including mixed office/industrial trade counters;
- monthly for 500 to 1000 sq m warehouses;
- quarterly for self storage and larger trade counters in excess of 1000 sq m;

G15 Demand is intense for premises below 300 sq m. There is also a requirement for accommodation within the 500 to 1000 sq m size range. Businesses seeking larger buildings will be attracted to other M5 corridor locations.

G16 The total take up of demand over the five years up to 2005 was over 36,000 sq m but the supply was only 20,000 sq m (AK Market Monitor 2006).

The Demand and Supply of Employment Land, Sites and Premises in South West England (DTZ Consulting, January 2007)

G17 Exeter is described as a key driver in its part of the region attracting national and international companies as a result of its location at the end of M5. There is a potential shortfall of supply because of current constraint issues. There is high demand for office space in City Centre. The 6,700 sq m Senate building was half let well before completion.

G18 Demand for employment space outstrips supply. Vickery Holman research suggests that over the past five years there has been demand for 148,000 sq m of employment space but only 67,000 sq m has become available.

Industrial and Warehouse requirements

G19 Key themes within the industrial and warehousing sector are:

- increased demand for quality sites because of requirements of value, function and current regulations;
- reduced demand for larger sites as a result of consolidation accompanied by greater need for small to medium sized premises to accommodate component production;
- greater influence of availability and quality of distribution networks;
- higher importance of staff needs and existence of universities on location and clustering of businesses;
- more value placed on good rail connections despite continuing importance of access to the motorway network; and
- the establishment of regional rather than national distribution centres to reduce operating distances.

Offices

G20 Key themes in the office sector are:

- availability of sufficient staff with the right skills;
- increased desire for high quality accommodation reflected by build quality, surrounding environment and location;
- proximity to public transport networks/hubs particularly where the business has labour intensive functions; and

- continuing demand for accommodation despite impact of new technology and different working practices.

Exeter Employment Study (Atkins, March 2007)

G21 The owners, managers and directors of 100 offices in the Travel to Work area including 50 already in the City were asked a series of questions about the City Centre as a business location. They varied by size and type roughly reflecting the employment structure of this sector in the area. 19% of respondents thought the City Centre was a good business location. Main advantages of the location were said to be the image of the local area, the links to the national road network, good accessibility for staff and customers, and good links with other local businesses.

G22 On the other hand, nearly half the respondents considered lack of parking made Exeter a poor location for business. Poor road access and traffic congestion were other major disadvantages referred to.

G23 Over half the businesses employing more than 50 people favoured the City Centre as a location. A majority of estate and letting agents preferred the City Centre. A small majority of the firms providing business and other services, the largest group covered by the survey, preferred other locations. Most involved in design and routine office functions did not favour a City Centre location.

G24 It was concluded that businesses with a requirement to be in the City Centre would include regional and national headquarters and major service centres operating within the business, professional and financial services sectors. The study recommended that parking and access issues are addressed in the City Centre and efforts made to increase economic activity rates and encourage flexibility at the work place.

APPENDIX H: THE RELATIONSHIP OF DEMAND TO SUPPLY

Introduction

H1 Again the material presented relates to the period before the current recession.

H2 According to South West Central Zone Employment Overview prepared by Vickery Holman in November 2006, a lack of accommodation options in Exeter to allow natural growth has meant that businesses have had to compromise on location, specification, tenure and terms of occupation. In some places mezzanine floors have been introduced. More intensive use of the site has caused increased traffic to be generated and more traffic congestion. Expansion is often not possible because key estates are already at high density. This has the effect of limiting opportunities for new businesses and inhibiting the growth of older businesses. The natural recycling of business accommodation by replacement or refurbishment is being constrained because of lack of turnover. Some businesses are re-locating away from the City.

H3 Office rentals in Exeter in 2006 were in the region of £170 per sq m per annum. In the south west this level is only exceeded by Bournemouth and, by a wide margin, Bristol and Bath. Rents for industrial buildings at £60 to £80 per sq m per annum are close to the regional average with most types of property commanding higher rents in the Poole area, Bath, Bristol, Gloucester and Swindon.

H4 The table below relates the inquiries in the year up to 1 October 2007 for offices and industrial premises to the amount of office and industrial property on offer according to the Council's Property Register. It would appear that difficulty in obtaining office premises is significantly greater than it is for acquiring Industry/warehouse accommodation.

	Inquiries		On Offer		All On Offer as % of Enquiries
	Number	% of total	Number	% of total	
Offices	308	62.2	156	46.3	50.7
Industry	187	37.8	181	53.7	96.8

Offices

H5 A comparison between the size of office accommodation sought and the supply is set out in the table below in the year up to 1 October. Proportionately the demand matches supply well except for a shortage of units within the 215- 538 m range. It may be that, in reality, this deficiency will be met by the subdivision of larger units.

	Area range in sq m				
	Up to 108	**108-215**	**215 - 538**	**538-2153**	**2153 +**
% of Inquiries	36.5	29.5	12.5	7.0	4.0
% of properties on Register	34.6	31.5	19.2	10.0	4.6

H6 The breakdown of office supply in relation to quality overall is as follows according to Vickery Holman:

Type	**City Centre**			**Out of Town**		
	Rental £ sq m	**No**	**Area sq m**	**Rental £ sq ft**	**No**	**Area sq m**
New Build/Modern	175-180	0	0	160	5	856
Old Stock Refurbished	130-150	16	6,842	130-150	28	8.438
Refurbished Period	120-130	41	5,100	120-130	1	255
Poor Quality	75-85	18	5,605	75-85	14	2,577
TOTAL		75	17,547		48	12,126

Source: Vickery Holman, November 2006

H7 A significant amount of new City Centre office floorspace came forward early in 2008 but was occupied as soon as it was completed. Similar pressure existed out of town. Older stock will not meet the standards expected by occupiers in terms of profile, specification, presentation and location. This will pave the way for some redevelopment opportunities. In practice this will usually be for housing resulting in a loss of employment space. Poor quality space on upper floors is almost un-lettable being dysfunctional unless refurbished internally and externally. There is concern that the development industry will tend to ignore smaller potential developments with the result that the need for them will not be met.

Industry

H8 The relationship of demand to supply of industrial premises in the year up to 1 October 2008 according to the Council's Inquiries and Property Registers is set out below. There appears to be a severe shortage of larger units.

	Area range in sq m				
	Up to 108	**108-215**	**215 - 538**	**538-2153**	**2153 +**
% of Inquiries	18.0	24.6	18.0	32.8	6.6
% of properties on Register	12.5	40.3	20.8	6.9	1.4

H9 Below is an assessment of the quality of available industrial buildings:

	No	Area sq m	%
New build /modern	14	7,312	17
Old stock/refurbished	50	30,571	71
Poor quality	9	5,267	12

Source: Vickery Holman November 2006

H10 Most industrial premises are leasehold which is not popular locally. Older and refurbished stock is scattered around the City. Much of it is outdated with a low profile and quality tending to be un-let for long periods. Much of the demand is from trade operators for units of between 100 and 300 sq m floor area and they insist on key locations at Matford and Marsh Barton.

APPENDIX J: DETAILED ASSESSMENT GUIDE

Introduction

J1 Detailed guidance is provided below on the way in which the suitability of employment areas and sites has been assessed in Appendix K. In general, the attributes of each site are considered in relation to specific standards. If a standard is met or exceeded it is concluded that the site is good for employment in that respect. If the site fails to reach the standard it is regarded as being poor in that respect, and if the result is close to the required standard the site is described as medium in that respect. Exceptions to the approach described above are the primary requirements for good quality accommodation and, in relation to sites other than City Centre offices, accessibility to the trunk road system. The quality of accommodation is considered in relation to bands determined by the average age of buildings on the site. Accessibility to the trunk road system is assessed against the average accessibility provided by the relevant accessibility zone (see para 5.24, p. 19 and Appendix K, p. 68).

Assessment Tables

J2 The assessment of each employment area and site is presented in a table in Appendix K. Headings used in the tables are explained below.

<table>
<tr><td>No: Letter or number identifying the area or site. Employment areas, larger sites occupied by many businesses are identified by letter. This is followed by the number of the plan(s) showing its location.</td><td>Name of area or site. Capitals denote that it is an employment area of some size occupied by many businesses.</td><td>Area Area in hectares.</td></tr>
<tr><td colspan="3">Description: Brief description of the area or site</td></tr>
<tr><td colspan="2">Vacancies The number of vacant premises, their total floorspace according to the January 2009 Property Register and the amount of undeveloped land with planning permission according to the April 2008 Employment Planning Permissions and Completions Survey.</td><td>Rents Indication from Property Register data where available.</td></tr>
<tr><td colspan="3">History: Recent history in particular reporting on past vacancy levels and any interest in alternative use of the area or site.</td></tr>
</table>

Site Appraisal (Shaded areas relate to primary requirements)		
Heading (Site characteristics)	**Notes** (A description of the site in relation to the characteristic listed in the heading)	**Summary** (conclusion)
Other Considerations A note of any factors influencing the assessment not included in the headings above.		
Redevelopment/Improvement potential: (Applies to Existing Employment Sites only) Scope to raise values through increasing the amount and quality of the accommodation is considered against likely cost and other barriers such as land assembly and access improvements. Where redevelopment appears to be justified a second assessment using the above headings is carried out reflecting the benefits it is expected to deliver. If the area or site is in the City Centre the redevelopment is to provide offices. The assumptions below about requirements for City Centre offices then apply.		
Development Constraints: (Applies to proposed and potential employment sites only.) Any factors that might constrain the amount or type of development are identified.		

Assessment Standards

J3 The standards against which the quality of the site will be assessed in relation to each site attribute are listed below. Notes provide context to the choice of standards selected and evidence that is provided by the assessments.

Heading	**Standard**	**Notes**
Quality of accommodation	Average building on site constructed: 5 = since 1/04/ 2000; 4 = between 1/04/1993 and 1/04/ 2000 3 = between 1974 and 1/04/1993 2 = before 1974 purpose made buildings and conversions of listed buildings 1 = other buildings	Assessment based on average age of buildings adapted to reflect overall mix and evidence of improvements
Car parking	<u>City Centre Offices:</u> 1 space per 30 sq m floorspace. <u>Other Employment Sites:</u> B1 Including Offices - 1 space	Assessment against Local Plan First Review standards provided by Policy T10. The policy limits on site parking to operational needs only in

	per 30 sq m B2 General Industry - 1 space per 50 sq m B8 Warehousing - 1 space per 200 sq m. Given the existing and anticipated mix of employment types a standard of 1 space per 50 sq m is considered appropriate for new developments.	part of the Centre. Otherwise the normal standard for offices applies. User requirements prevail over planning requirements with the effect that provision is seen to be good if above the specified standard and vice versa.
Access to the Trunk Road System	City Centre Offices: Site has direct access onto a Local Primary Road. Other Employment Sites: Connections to the trunk road system are reasonably good, in comparison with other employment sites within the same zone.	The assessment requires consideration of the ease of movement to the trunk road network bearing in mind access to the site, connections to Local Primary Roads where necessary, and the location of areas where congestion is greatest.
Access to Public transport	City Centre Offices: Within 500m of the High Street, Sidwell Street, Fore Street or St David's Station. Other Employment Sites: At least two services with a combined frequency of not less than 5 an hour.	Assessment is of the quality of bus and rail services that can be accessed within 500 m of the area or site. Separate bus services are identified by service numbers. Lettered services are City buses, which, with park and ride and services 1, 2 & 57 (with variations), provide highest bus frequencies. Frequencies are the number of buses/trains per normal working day per hour in one direction.
Access to Shops etc	City Centre Offices: Within 500 m of the High Street. Other Employment Sites: Within 500 m of convenience store.	Assessment takes into account the quality of the retail centre and whether it is within reasonable walking distance along a convenient and safe route
Proximity other Employment	City Centre Offices: Site, on its own, or with adjoining employment land comprises 2 ha or more. Other Employment Sites:	Function of size of the area/site and proximity and size of adjoining employment areas. Also significant are the shape of the site and any barriers to

	Site, on its own, or with adjoining employment land comprises 5 ha or more.	movement. A smaller area is applicable for City Centre offices because of higher densities.
Size	City Centre Offices Comprises 1 ha or more. Other Employment Sites: Comprises 2 ha or more.	Assessment of site's capacity to accommodate a range of business types and sizes. This is affected by size and, for smaller sites, their shape, terrain and access.
Prominence	City Centre Offices: Readily visible form Local Primary Road or main pedestrian route. Other Employment Sites: Readily visible from M5, Outer Bypass and Local Primary Roads	Good sites from this perspective are prominent from and close to the M5 or an M5 junction or, in the City Centre, from Western Way, Southernhay or main shopping streets.
Quality of Surroundings	A subjective assessment taking into account amount of planting, space between buildings, quality of architecture and open views.	
Hi Tech Connections	Connected to ADSL and SDSL	Connection to ADSL & SDSL is used indicatively. No information is available about isolated smaller sites and it is assumed that only large sites are likely to be connected.
Access from Housing	Site is within 1 km of 3,000 dwellings.	Notes draw attention to proximity of any deprived areas (see B14).
Affect on Adjoining Areas	Not far from housing but there is no evidence of environmental conflicts	The amount and proximity of vulnerable uses and features and evidence of any conflicts with the employment use.

APPENDIX K: SITE ASSESSMENTS

(See Appendix J for a guide to the assessment tables that follow)

Introduction

Employment areas and sites are considered in groups as follows:

K1	Existing Employment Areas - Zone I	
A	EXETER BUSINESS PARK	Plan 3
B	SOWTON	Plan 3
K2	Existing Employment Areas and Sites – Zone II	
C	PINHOE	Plan 4
D	PENINSULA PARK	Plan 5
E	PYNES HILL	Plan 5
F	MARSH BARTON	Plan 6
G	MATFORD	Plan 6
1	BT Depot, Main Road, Pinhoe	Plan 4
2	Garage and Showroom, Main Road, Pinhoe	Plan 4
K3	Existing Employment Areas and Sites – Zone III	
H	HARRINGTON LANE/BRICKWORKS AREA	Plan 4
J	HAVEN BANKS /WATER LANE AREA	Plan 7
3	Western Road, St Thomas	Plan 7/8
4	Wippell's, Buller Road	Plan 7/8
5	Larkbeare House, Topsham Road	Plan 7/8
6	Exwick Mill, St Andrew's Road	Plan 9
7	Laundry, Cowley Bridge Road	Plan 9
8	Yeo & Davey, Old Tiverton Road	Plan 8/11
9	Retreat Boat Yard, Topsham	Plan 10
10	BT building Off Station Rd, Topsham	Plan 10
K4	Existing City Centre Office Areas and Sites	All on Plan 8
L	NEW NORTH ROAD/ LONGBROOK STREET	
M	SOUTHERNHAY	
11	St David's Hill. Radio Station and DCC offices	
12	National House and Adj office at Queen St/New North Rd	
13	Buildings at Queen Street/Richmond Road	
14	Rougemont and Castle St	
15	Clarendon House, Western Way	
16	Mary Arches Street/Bartholomew St East – South Side	
17	Renslade House, Tudor Street	
18	BT offices, Commercial Road	

K5 Existing City Centre Employment Areas and Sites not predominately in office use

K	SUMMERLAND STREET AREA	All on Plan 8
19	Premises west of St David's Station	
20	BT building, Queen Street	
21	Mary Arches Street/Bartholomew St East –North Side	
22	Market Street	
23	West Street/Fore Street	
24	Tudor Street/Frog Street	

K6 Proposed City Centre Office Areas Both on Plan 8

N	St David's Station Car Parks
P	Land at Central Station Yard

K7 Proposed Employment Areas other than for offices in the City Centre

Q	Land west of Exeter Business Park	Plan 4
R	Land off A379	Plan 5

K8 Potential Employment Areas on Previously Developed Land

S	RAILWAY LAND WEST OF ST DAVID'S STATION	Plan 8/9
T	Bus And Coach Station	Plan 8
I	Bonhay Road, Tudor Street	Plan 8
U	Exmouth Junction	Plan 11
V	Bishops Court Quarry	Plan 5

K9 Potential Employment Areas on Greenfield Land

W1	Monkerton	Plan 4
W2	Hill Barton	Plan 4
W3	Honiton Road	Plan 4
W4	Land East of Monkerton	Plan 4
X1	St Bridget Nurseries	Plan 5
X2	Sandy Park Farm	Plan 5
X3	Land South of Sandy Park Farm and Old Rydon Lane, East of Railway.	Plan 5
Y	Land N of Topsham Rd west of M5	Plan 10
Z	Matford Park	Plan 6

Summaries of the criteria for establishing whether an area or site is within Zones I, II or III, set out in the main report at para 5.24, are repeated below for assistance. The indication of the extent of Zone I, II and III is given by Plan 1. The City Centre is shown by Plan 8.

Zones of Accessibility to the Trunk Road System

Zone I takes in areas within 1.5 km of M5 junctions by means of modern two way roads with intersections formed by roundabouts or light controlled junctions; and

Zone II covers areas with similar quality connections to:

- M5 junctions over a distance of between 1.5 and 2.5 km;
- up to 1. km of the Outer Bypass; or
- up to 1.5 km of the junction of Alphington Road with the A 30.

Zone III comprises the rest of the City excluding the City Centre.

K1: Existing Employment Areas - Zone I

No: A - Plan 3	**EXETER BUSINESS PARK**	**Area** 34.7 ha
Description: Modern development nearing completion in prominent location close to M5 junction 29. Offices mainly on the frontage. Mixed employment uses at rear. Includes Met Office, EDF Call Centre and Ashfords regional HQ.		
Vacancies: Offices: 6 including 2 major new developments comprising 11.400 sq m. total 12,800 sq m. No long term vacancies. Unimplemented planning permissions (April 2008) cover 3.47 ha, 12,300 sq m floor area.		**Rents** Premium office rates.
History: Rapid development since 2000. Vacancies very short term. Development nearly completed.		

Site Appraisal (Shaded areas relate to primary requirements)

Heading	Notes	Summary
Planning Considerations		
Quality of accommodation	All Post 2000	5
Car parking	To Contemporary requirements	Good
Access to Trunk Roads	Zone I. Parts adjoin M5 junction 29	I Good
Access to Public transport	Reasonably accessible 9 buses per hour. B, H1, PR2, 56, 60,380. Possible improved cross town route.	Good
Access to Shops etc	None within reasonable walking distance	Poor
Proximity other Employment	Large area adjoining another large employment area	Good
Size	Wide range of sites and accommodation available	Good
Prominence	Highly prominent on main route into City	Good
Quality of Surroundings	Attractive landscaped grounds. Some sites with good views	Good
Hi Tech Connections	Connected to ADSL & SDSL	Good
Access from Housing	Little within easy walking distance but likely to increase	Medium
Affect on Adjoining Areas	Not close to housing or other vulnerable uses	Good

Redevelopment/Improvement potential: N/A Note unimplemented permissions on Greenfield land.

Conclusions: A good quality existing employment area that should be retained.

No: B - Plan 3	**SOWTON**	**Area:** 104.7
Description: Popular quality estate with excellent access to the M5. Small/medium sized trade and distribution businesses predominate in less prominent locations. 5.62 ha are subject of unimplemented planning permissions for employment development.		
Vacancies: 7 offices, 3,200 sq m total. 1,900 sq m in one building. 21 Industry/warehouse premises total 24,200 sq M. Some locations where vacancies persist e.g. Park Five. Unimplemented planning permissions: 2.15 ha, 9110 sq m.		**Rents:** Office rents average. Industry/ warehouse average reflecting size of units
History: Development at Sowton commenced in the 1970s between the two motorway connections. It started to expand into adjoining land to the north (Exeter Business Park) and south in the 1990s.		

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Majority 1974 to 2000	3-4
Car parking	Sufficient on site	Good
Access Trunk Roads	Zone I Parts adjoin J29.	I Good
Access to Public transport	9 buses per hour Honiton Road & Sidmouth Road including P&R. Services B, PR2, 56, 60, 380, PR4, 52 series. Centre of estate poorly served. Should benefit from cross town improvements proposed. Digby and Sowton rail halt accessible from S of estate – (2 trains per hour).	Good/ Medium
Access to Shops etc	Limited	Poor
Proximity other Employment	Large estate adjoining others	Good
Size	Wide range of sites and accommodation available	Good
Prominence	Parts front main routes to J29 and J30. Also prominent locations on Moor Lane	Good
Quality of Surroundings	Attractive landscaped and spacious	Medium
Hi Tech Connections	Connected to ADSL & SDSL	Good
Access from Housing	Not close to housing	Poor
Affect on Adjoining Areas	Not close to housing or other vulnerable uses	None

Redevelopment/Improvement potential:

- Land east of Moor Lane adjoining the A30 is likely to come forward for development - A potentially prominent site with excellent access but it is unattractive in appearance*.*
- Not all of the permission relating to the Park Five office development fronting Sidmouth Road has been implemented. There are frequent vacancies in existing buildings*.*

Conclusions: A good quality existing employment area that should be retained.

K2: Existing Employment Areas and Sites – Zone II

No: C - Plan 4	**PINHOE**	**Area:** 9.29
Description: Early 20th Century development of utilitarian warehouses and workshops surrounded by roads and hard surfaces.		
Vacancies: 1 office of 800 sq m and 4 Industry/warehouse premises of total 1300 sq m.		**Rents:** Relatively low
History: Tends to have few vacancies. Suitability has improved recently because of the completion of a new road linking Honiton Road close to M5 junction 29 to the Pinhoe Road frontage adjoining the area.		

Site Appraisal (Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Purpose made buildings mostly pre 1993	2-3
Car parking	Sufficient including on street parking	Medium
Access Trunk Roads	Zone II Adjoins Outer Bypass and has almost direct link to M5 J29 over less than 2.5 km	II Good
Access to Public transport	15 bus per hour on/near frontage. B, H1, K, T, PR2, 1 series.	Good
Access to Shops etc	Sainsburys within easy walking distance	Good
Proximity other Employment	Smallish estate but potential links to Harrington Lane/Brickworks area	Medium
Size	Tends to be small sites	Medium
Prominence	Prominent frontage onto Pinhoe Road	Medium
Quality of Surroundings	Limited planting, congested and a bit run down	Poor
Hi Tech Connections	No SDSL connection	Poor
Access from Housing	Relatively isolated	Poor
Affect on Adjoining Areas	Part of site adjoins housing.	Medium

Redevelopment/Improvement potential: Limited. Intensely developed area with many separate businesses.

Conclusions: A good quality existing employment area that should be retained.

No: D - Plan 5	**PENISULA PARK**	**Area** 4.97 ha
Description: Modern office development comprising several large buildings and area for further development on Outer Bypass.		
Vacancies: Two offices with 1100 sq m. 2,100 sq m office proposed.		**Rents:** High
History: Development started in 1990s. Still not complete.		

Site Appraisal (Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Modern	4-5
Car parking	Contemporary requirements	Good
Access Trunk Roads	Zone II. Fronts Outer Bypass. Within 2.5 km of M5 junction 30	II Good
Access to Public transport	15 buses per hour within 500m but from different stops (H, B, D, PR4 & 52 series).	Good
Access to Shops etc	Tesco approx 600m to south. Need to cross busy road	Medium
Proximity other Employment	Fairly small site but close to Rydon Lane Employment area	Medium
Size	Limited range of buildings.	Medium
Prominence	Prominent on Outer Bypass	Good
Quality of Surroundings	Pleasant landscaped surroundings	Good
Hi Tech Connections	ADSL and SDSL	Good
Access from Housing	Extensive low density residential areas nearby.	Medium
Affect on Adjoining Areas	Housing nearby but limited conflict of uses	Medium

Other Considerations: Areas covered by unimplemented planning permission are greenfield land.

Redevelopment/Improvement potential: None. Recent development with limited scope for extension. Some land covered by unimplemented planning permission on Greenfield land.

Conclusions: A good quality existing employment area that should be retained.

No: E - Plan 5	**PYNES HILL**	**Area** 17.97 ha

Description: Modern office development comprising number of buildings some divided into smaller units.

Vacancies: 8 offices with 1900 sq M. Unimplemented planning permission for 3,417 sq m on 0.73 ha.	**Rents:** High

History: Development started in 1990s. Recently completed.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Planning Considerations		
Previously Developed Land	Existing	Yes
City Centre Office		No
SHADED AREAS RELATE TO PRIMARY REQUIREMENTS		
Quality of accommodation	Modern post 2000	4-5
Car parking	Contemporary requirements	Good
Access Trunk Roads	Zone II. Fronts Outer Bypass. Within 2.5 km of M5 junction 30	II Good
Access to Public transport	8 buses per hour, (H,B&D) within 500m	Good
Access to Shops etc	Tesco within easy walking distance but across busy road	Good
Proximity other Employment	Fairly small site but close to Peninsula Park	Medium
Size	Wide range of accommodation	Good
Prominence	Prominent on Outer Bypass	Good
Quality of Surroundings	Pleasant landscaped surroundings	Good
Hi Tech Connections	ADSL and SDSL	Good
Access from Housing	Limited	Poor
Affect on Adjoining Areas	Housing nearby but limited conflict of uses	Medium

Redevelopment/Improvement potential: None. Recent development with limited scope for extension.

Conclusions: A good quality existing employment area that should be retained.

No: F - Plan 6	**MARSH BARTON**	**Area** 76.2 ha

Description: The employment area has been under continuous development since the 1950s extending to the south west away from the City Centre. Main function is as warehouse distribution area including many smaller units and some offices. Use is intensive so that landscape is limited and, in some places, there is traffic and parking congestion. Poor quality surroundings undermine parts as office areas. Accessibility is not ideal for industry/warehouse use but demand is strong reflecting the size of the estate and the range of opportunities it provides. Access very much dependent on use of private car. Concentration of employment very large with consequent planning benefits.

Vacancies: 3 offices with total 345 sq m and 33 industry/warehouse premises totalling 19,200 sq m are vacant. 3.09 ha 8,600 sq m covered by unimplemented planning permissions.	**Rents:** Middle range

History: Few long term vacancies. Some pressure for non-employment uses especially retail.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Considerable variety but mainly purpose built in period up to 1993	2-3
Car parking	Some on street parking is necessary.	Medium
Access Trunk Roads	Zone II. With limited exceptions all within 1.5 km of A 30. All will be once Grace Road link provided. Also well related to Outer Bypass via Matford.	II Medium
Access to Public transport	6 P&R buses and 2 local buses (B) per hour accessible from most of estate.	Good
Access to Shops etc	Not good although parts of estate within reasonable walk of LiDL and local shops	Medium
Proximity other Employment	Large trading estate. Adjoins Matford area	Good
Size	Wide range of sites and accommodation	Good
Prominence	Some prominent sites fronting through routes	Medium
Quality of Surroundings	Intensive development. Landscape limited.	Poor
Hi Tech Connections	Coverage by ADSL and SDSL probable	Good
Affect on Adjoining Areas	Adjoins residential in a few places	Good
Access from Housing	Accessible population fairly limited	Poor

Redevelopment/Improvement potential: Generally limited because high density and occupancy rates limits scope to add sufficient value. Opportunities for improvement listed below covered by permissions:

- Baker's Yard area - some undeveloped land and scope for general improvements.
- Corner Marsh Barton Road/Alphington Road - extensive vacant and poorly used area subject to redevelopment proposals.

Conclusions: A good quality existing employment area that should be retained.

No: G - Plan 6	**MATFORD**	**Area** 73.47 ha

Description: Continuation of Marsh Barton Estate but to higher quality layout and building design. Comprises industry warehousing with significant number of offices and quasi industrial uses such as car showrooms.

ancies: 6 industry/warehouse premises with total 2,900 sq lemented planning permissions 5.12 ha 14,500 sq m.	**Rents:** Middle range

History: Primarily developed since 1990. Nearing completion.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	All post 1993	4-5
Car parking	Contemporary standards	Good
Access Trunk Roads	Zone II. All within 1 km of Outer bypass or 1.5 km of A30 junction	II Medium
Access to Public transport	All within 500m of 6 per hour P&R buses.	Medium
Access to Shops etc	Nothing within reasonable walking distance	Poor
Proximity other Employment	Large estate adjoining Marsh Barton	Good
Size	Good range	Good
Prominence	Prominent along major route into City	Good
Quality of Surroundings	Well laid out and extensively planted	Good
Hi Tech Connections	Coverage by ADSL and SDSL probable	Good
Access from Housing	Limited housing in vicinity	Poor
Affect on Adjoining Areas	Few nearby dwellings. Landscape attractive	None

Redevelopment/Improvement potential: Limited. Recently developed area. Note: Some greenfield land subject of unimplemented planning permissions.

Conclusions: A good quality existing employment area that should be retained.

No: 1 - Plan 4	**BT Depot, Main Road, Pinhoe**	**Area:** 0.29 ha

Description: Mid 20th Century building set back from road.

Vacancies: None

History.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	1970s design purpose made building	3
Car parking	Sufficient	Good
Access Trunk Roads	Zone II. Just within 1 km of Outer Bypass	II Poor
Access to Public transport	Accessible to 12 buses per hour (B,K,T &1 series.) and Pinhoe Station (1 train per 2 hrs)	Good
Access to Shops etc	Close to Pinhoe local centre	Good
Proximity other Employment	Isolated	Poor
Size	Small	Poor
Prominence	Set back from main road out of City	Poor
Quality of Surroundings	Suburban	Medium
Hi Tech Connections	Unknown	
Access from Housing	Limited accessible population	Poor
Affect on Adjoining Areas	Adjoins housing but no known problems	Medium

Redevelopment/Improvement potential: Probably not viable. Intense well established use.

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 2 - Plan 4	**Garage and showroom, Main Road, Pinhoe**	**Area:** 0.25 ha

Description: Showroom with forecourt and workshops etc

Vacancies: None

History: Some interest in redevelopment for housing.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	1960/1970s buildings with some refurbishment	2-3
Car parking	Large forecourt	Good
Access Trunk Roads	Zone II. Just within 1 km of Outer Bypass	II Poor
Access to Public transport	Accessible to 12 buses per hour (B,K,T &1 series) and Pinhoe Station (1 train per 2 hrs)	Good
Access to Shops etc	Close to Pinhoe local centre	Good
Proximity other Employment	Isolated	Poor
Size	Small	Poor
Prominence	Prominent on main radial	Medium
Quality of Surroundings	Suburban. A bit disjointed	Medium
Hi Tech Connections	Not known	
Access from Housing	Limited accessible population	Poor
Affect on Adjoining Areas	Some housing next door. No apparent problems	Medium

Redevelopment/Improvement potential: Scope for redevelopment that could raise the site's value as employment site. Residential likely to provide better return.

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

K3: Existing Employment Areas and Sites – Zone III

No: H - Plan 4	**HARRINGTON LANE/BRICKWORKS AREA**	**Area** 17.16 ha

Description: Comprises purpose built small business complex on Harrington Lane, Ibstock brickworks, now closed; nearby warehouse/office buildings and a large cold store; now subject of a planning permission for redevelopment for housing. Includes two sites comprising together 5.4 ha at the brickworks and to the west proposed for employment development by the Local Plan. The intention is that the land is released for employment subject to provision of a road link over railway to Main Road Pinhoe Site.

Vacancies: Brickworks, cold store sites, 2 small industrial units on Harrington La and 3 offices, with a combined area of 475 sq m, are vacant.	**Rents:** Relatively low.

History: Brickworks and Cold Store closed in 2007. There has been little interest in the Local Plan sites.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Purpose made buildings mostly pre 1993	2-3
Car parking	Sufficient on site	Good
Access Trunk Roads	Zone III. Although close to Outer bypass and M5 routes to them indirect, limited capacity and through housing areas	III Poor
Access to Public transport	2 buses per hr on Harrington Lane. (B)	Poor
Access to Shops etc	None in reasonable walking distance	Poor
Proximity other Employment	Reasonably large area but much vacant	Medium
Size	Varied sites	Good
Prominence	Little presence	Poor
Quality of Surroundings	Main parts run down. Limited planting	Poor
Hi Tech Connections	No SDSL connection	Poor
Affect on Adjoining Areas	Much of site adjoins housing. Access via Chancel Lane is environmental and safety problem	Medium
Access from Housing	Relatively isolated	Poor

Other Considerations: Includes land proposed for employment by the Local Plan Review. Part of this is Greenfield.

Redevelopment/Improvement potential: Substantial area underused. Possibility of greatly improving accessibility by introducing link road connecting to Pinhoe Employment area and trunk road system.

Conclusions: Medium to poor quality employment area but there is potential for redevelopment/improvement.

Site Appraisal: Harrington Lane/ Brickworks Area Following Redevelopment
(Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Redevelopment would result in most accommodation being of modern standard.	3-5
Car parking	Satisfactory provision as a result of redevelopment	Good
Access Trunk Roads	Zone II. Provision of the link would bring site within 1 km of Outer bypass and parts within 2.5 km of M5 junction 29.	II Good
Access to Public transport	15 buses per hour most on Main Road Pinhoe (B, H, K, T & 1 series.)	Good
Access to Shops etc	Small part within 500 m walking distance of Sainsbury's	Medium
Proximity other Employment	Sizeable employment area Linked to Pinhoe Estate (C)	Good
Size	Varied sites	Good
Prominence	Little presence	Poor
Quality of Surroundings	Could be greatly improved as part of redevelopment	Good
Hi Tech Connections	Uncertain whether improvements would follow from redevelopment	
Access from Housing	Relatively isolated	Poor
Affect on Adjoining Areas	Redevelopment would enable existing and potential future conflicts between employment and housing to be addressed.	Good

Conclusions: Redevelopment/improvement should enable good quality employment land to be provided and should therefore be encouraged. This would include greenfield land allocated for employment development by the Local Plan First Review.

No: J - Plan 7	**HAVEN BANKS /WATER LANE AREA**	**Area:**13.7 ha

Description: Level previously heavily industrialized area next to canal. Much underused and unattractive. Ground pollution and flooding potential problems. Vehicular access only possible via busy Alphington Road or through narrow Tan Lane connecting to Marsh Barton. Pockets of industry remain including an animal rendering plant and an asphalt plant neither of which are good neighbours for housing or easy to relocate. There are two enclaves of small units, one in purpose made buildings, meeting the needs of small businesses who are attracted by low rents and do not need quality buildings or good road access.

Vacancies: 5 vacant industry/warehouse premises. Total 1,200 sq m. Unimplemented planning permission on 0.04 ha, 374 sq m.	**Rents** Average

History: First developed at the beginning of the 20th Century to accommodate heavy industry and public utilities. Parts redeveloped for housing. Other areas under used. Some interest in further redevelopment for housing.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Some pre 1974 purpose made buildings. Remainder mainly 1974 to 1993	2-3
Car parking	Sufficient including adjoining off site areas	Good
Access Trunk Roads	Zone III. Vehicular access only possible via busy Alphington Road to North of area or by narrow Tan Lane through Marsh Barton	III Poor
Access to Public transport	Northern section accessible to 6 per hour P&R service.	Good/ Medium
Access to Shops etc	Northern area within easy walking distance of shop on Haven Road and restaurants etc at the Basin	Medium
Proximity other Employment	Large area but fragmented by underused areas	Medium
Size	Reasonable range	Good
Prominence	Low profile inaccessible area	Poor
Quality of Surroundings	Overall setting with canal and river valley good but area itself generally run down and unattractive	Medium
Hi Tech Connections	Doubtful	Poor
Affect on Adjoining Areas	Residential development within and adjoining area. Major problems smell from animal rendering plant and noise/pollution from heavy goods vehicles.	Poor
Access from Housing	Only accessible to limited population	Poor

Other Considerations: The area is subject to flood risk. Regeneration of part near the Basin has been encouraged including housing.
Redevelopment/Improvement potential: Much of area polluted and may be subject to flood risk. Access problem could be reduced but not overcome by provision of expensive road link to Alphinbrook Lane. Overall disadvantages as employment area would not justify this.
Conclusions: A medium/poor quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 3 - Plan 7	**Western Road, St Thomas**	**Area:** 1.02 ha

Description: Early 20th Century timber processing plant.

Vacancies: None

History: Some interest in redevelopment for housing in the past.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Long established premises with some improvements	2-3
Car parking	Sufficient	Good
Access Trunk Roads	Zone III. Far from M5, A30 etc accessed by narrow lane	III Poor
Access to Public transport	9 buses per hour within 500m (F&P)	Good
Access to Shops etc	Within 500 m Cowick Street shops	Good
Proximity other Employment	Little employment in vicinity	Poor
Size	Reasonable size to allow flexibility	Medium
Prominence	Low profile site	Poor
Quality of Surroundings	Adjoins railway, allotments and housing.	Poor
Hi Tech Connections	Not known	
Access from Housing	Central in large residential area	Good
Affect on Adjoining Areas	Adjoins housing. Occasional concerns	Medium/ Poor

Redevelopment/Improvement potential: Not justified because of poor location.

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 4 - Plan 7	**Wippell's, Buller Road**	**Area**: 0.43 ha

Description: Church furnishing manufacturer in early 20th Century buildings on one and two floors.

Vacancies: None

History: Adjoining site redeveloped for housing.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Purpose made pre 1974 buildings	2
Car parking	Sufficient	Good
Access Trunk Roads	Zone III. Just off Local Primary Road remote from M5, A30 etc in shopping centre	III Medium
Access to Public transport	4 bus services with 21 buses per hour within 500 m (A, E, 5,173,359,360 & 520) and St Thomas Station (Hourly rail service).	Good
Access to Shops etc	Adjoins Cowick Street shopping centre	Good
Proximity other Employment	Limited employment in vicinity	Poor
Size	Site fairly confined. Scope for alternative office use	Poor
Prominence	Low profile on back street	Poor
Quality of Surroundings	Mixed use high density area	Medium
Hi Tech Connections	Not known	
Access from Housing	Centre of heavily populated area	Good
Affect on Adjoining Areas	Housing adjoins site	Medium

Redevelopment/Improvement potential: Not justified because of poor location.

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 5 - Plan 7	**Larkbeare House, Topsham Road**	**Area:** 2.20 ha

Description: Late Victorian building in extensive heavily planted grounds used as conference/training centre.

Vacancies: None

History: Large house formerly Judge's lodgings. Now converted to conference centre.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Converted house	2
Car parking	Abundant	Good
Access Trunk Roads	Zone III. On radial route close to City Centre. Poor visibility at access.	III Poor
Access to Public transport	10 buses per hour on frontage (R,S,K,T)	Good
Access to Shops etc	Some local shops. City Centre shopping within 500m	Good
Proximity other Employment	Isolated –Southernhay approx 600m away.	Poor
Size	Small	Poor
Prominence	Concealed although on local primary road	Poor
Quality of Surroundings	Very attractive park land. Views over river	Good
Hi Tech Connections	Not known	
Access from Housing	Central in extensive housing area	Good
Affect on Adjoining Areas	In extensive parkland. Some housing to north.	Medium

Other Considerations: Large site only partially developed. Remainder is mature park land.

Redevelopment/Improvement potential: Limited. Historic building in attractive parkland. More intensive development would seriously harm character of area.

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 6 - Plan 9	**Exwick Mill, St Andrew's Road**	**Area:** 1.62 ha

Description: 19 Century former mill in variety of uses in open countryside including residential.

Vacancies: Considerable amount of underused land.

History.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Old mill in some disrepair	1-2
Car parking	Abundant	Good
Access Trunk Roads	Zone III. Has constrained access off minor road	III Poor
Access to Public transport	Within 500m 6 bus per hour service (F)	Medium
Access to Shops etc	None within 500m	Poor
Proximity other Employment	Isolated	Poor
Size	Limited scope to provide flexibility	Poor
Prominence	Not easily found	Poor
Quality of Surroundings	Attractive	Good
Hi Tech Connections	Not known	
Access from Housing	Remote from housing	Poor
Affect on Adjoining Areas	Attractive rural riverside surroundings	Medium

Redevelopment/Improvement potential: Very limited given poor location and likely site constraints.

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 7 - Plan 9	**Laundry, Cowley Bridge Road**	**Area:** 0.46 ha

Description: Early 20th Century laundry on narrow site between busy road and railway.

Vacancies: None.

History: Proposals for student housing on adjoining warehouse site.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Purpose made older buildings. Some modernization	2
Car parking	Sufficient	Good
Access Trunk Roads	Zone III. On Local Primary Road separated fromM5, A30 or Outer Bypass by City Centre/Exe bridges.	III Poor
Access to Public transport	11.5 buses per hour on main frontage D, 50, 51, 55, 155, 315 & 355)	Good
Access to Shops etc	Accessible to filling station shop	Medium
Proximity other Employment	Isolated	Poor
Size	Small site- limited flexibility	Poor
Prominence	Prominent on local primary road but not on route from M5, A30 etc	Medium
Quality of Surroundings	Narrow site between road and railway	Poor
Hi Tech Connections	Unknown	
Access from Housing	Limited population in walking distance	Poor
Affect on Adjoining Areas	Housing adjoins site to north.	Medium

Redevelopment/Improvement potential: Poor location of the site would not justify redevelopment for employment purposes.

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 8 - Plan 8/11	**Yeo & Davey, Old Tiverton Road**	**Area:** 0.28 ha

Vacancies: None

Description: Car sales, forecourt, shop, workshops and garages.

History: Allocated for housing in Local Plan.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Mixture including older purpose made buildings and fairly new forecourt	2-3 Pl
Car parking	Congested site	Medium
Access Trunk Roads	Zone III. On secondary road not on direct route to M5 or Outer Bypass	III Medium
Access to Public transport	Within 500m Sidwell Street bus routes with 30 buses per hour	Good
Access to Shops etc	Within 500m of City Centre shops	Good
Proximity other Employment	Isolated small site but within 500 m of Summerland Street area.	Medium
Size	Small	Poor
Prominence	Only high profile locally	Poor
Quality of Surroundings	On busy street flanked by terraced houses with small gardens. Some are listed	Medium
Hi Tech Connections	Not known	
Affect on Adjoining Areas	Adjoins housing.	Potential
Access from Housing	Centre of heavily populated area. Within 1000m deprived Sidwell St/Heavitree Road areas	Good

Redevelopment/Improvement potential: Main problem is location of the site. Redevelopment would therefore provide little benefit

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 9 - Plan 10	**Retreat Boat Yard, Topsham**	**Area:** 1.35 ha

Description: Extensive open storage and slipways with early 20th Century workshops and stores.

Vacancies: None

History: Long established business.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Varied but primarily pre-1974	2
Car parking	Abundant	Good
Access Trunk Roads	Zone III. Approx 1600 m from Outer Bypass. Well located for Zone III site	III Good
Access to Public transport	7 buses per hour along Exeter Road 150m away (T&57)	Good
Access to Shops etc	No shops within 500m	Poor
Proximity other Employment	Isolated	Poor
Size	Fairly large site but some limitations on how it is used likely	Medium
Prominence	Set back from road	Poor
Quality of Surroundings	Attractive riverside setting	Good
Hi Tech Connections	Unknown	
Access from Housing	Little housing within convenient walking distance	Poor
Affect on Adjoining Areas	Attractive riverside location. Some housing nearby	Medium

Other Considerations: High amenity value of the riverside area.

Redevelopment/Improvement potential: Scope may be constrained by planning considerations

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

No: 10 - Plan 10	**BT building off Station Rd, Topsham**	**Area:** 0.29 ha

Description: Level site. Late 20th Century purpose made single storey building.

Vacancies: None

History.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	1970s/80s building	2
Car parking	Adequate	Good
Access Trunk Roads	Zone III. On busy section of Local Primary Road close to Topsham town centre.	III Medium
Access to Public transport	Close to two bus routes with total 7 buses per hour (T & 57) and Topsham railway station (2 trains per hour).	Good
Access to Shops etc	Close to Topsham shops	Good
Proximity other Employment	Limited employment in the area	Poor
Size	Small size. Limited flexibility	Poor
Prominence	Low profile	Poor
Quality of Surroundings	Suburban	Medium
Hi Tech Connections	Not known	
Access from Housing	Limited population within easy walking distance	Poor
Affect on Adjoining Areas	In residential area. No known problems	Medium

Redevelopment/Improvement potential: Not justified given poor location.

Conclusions: A medium quality existing employment site where the loss of employment use could be considered provided that there are no good operational reasons for the existing business to occupy the site or evidence of a need to retain employment opportunities in the area.

K4: Existing City Centre Office Areas and Sites

No: L - Plan 8	**NEW NORTH ROAD/ LONGBROOK STREET**	**Area:** 0.9 ha
Description: High density fairly recent City Centre development along busy cross town. Relatively small area. Some conversion/ redevelopment of employment buildings to provide housing. Prominent but frontages close to busy highway.		
Vacancies: 8 offices vacant with total 2600 sq m.		**Rent** Medium to low.
History: Development has been sporadic with main building periods early 1970s and early 1990s. several major buildings subsequently converted to residential. Some offices have frequently had vacant space in the past.		

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Purpose made some fairly new	2-4
Car parking	Some parking	Medium
Access Trunk Roads	Part fronts busy Local Primary Road. Access can be difficult	Medium
Access to Public transport	Close to High Street, Central Station and Bus and Coach Station	Good
Access to Shops etc	Close to High St, Princesshay and Sidwell Street	Good
Proximity other Employment	Fairly small. Convenient walking distance of Southernhay	Medium
Size	Fairly small area but with variety of units	Medium
Prominence	On busy road close to shopping centre but some views narrow	Good
Quality of Surroundings	Fronts busy roads. No planting but some historic buildings	Poor
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Accessible to large population including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	Mixed area with some residential nearby. Impact minimal.	Good

Redevelopment/Improvement potential: Most buildings are relatively recent and development is at high density. Potential for redevelopment for employment use would appear limited.
Conclusions: A good/medium quality existing City Centre office area where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area.

No: M - Plan 8	**SOUTHERNHAY**	**Area:** 10.9 ha
Description: Large area comprising terraces of listed Georgian buildings converted into offices grouped around attractive City Centre park with, primarily between them and the Inner Bypass purpose made offices constructed in the 1970s and 80s in landscaped setting. Two office blocks recently completed in prominent location on Western Way.		
Vacancies: 35 separate offices with total of 15,200 sq m. 6,100 sq m in new developments. The amount of vacant floorspace in older buildings appears to have increased recently because of the cost of improving disabled access.		**Rents:** Relatively high.
History: Usually some vacant floor space reflecting size of area and large number of small units. Substantial recent developments. Parts of the former hospital RD&E hospital in Southernhay have recently become available for office use.		

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Varies from converted historic buildings to modern blocks	2-5
Car parking	Some. Much long and short stay parking in vicinity	Medium
Access Trunk Roads	Reasonable access onto Western Way	Medium
Access to Public transport	Close to High Street and Bus and Coach Station	Very Good
Access to Shops etc	Close to High Street, Princesshay, Sidwell Street and South Street shops.	Good
Proximity other Employment	Large employment area	Good
Size	Wide range of premises	Good
Prominence	Highly visible from Western Way and Southernhay	Good
Quality of Surroundings	Attractive. Adjoins park. Extensively landscaped	Good
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Accessible to large population including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	Few potential conflicts	None

Redevelopment/Improvement potential: Limited. Buildings tend to be either listed or relatively modern. There is scope to provide additional office space at the former RD&E Hospital through conversion and new development.
Conclusions: A good quality existing City Centre office area that should be retained in employment use.

No: 11 - Plan 8	**St David's Hill.** **Radio Station and DCC offices**	**Area:** 1.05 ha

Description: Late 20th Century purpose made radio station + late 19th Century houses in office and residential use. Includes DCC office in extensive landscaped grounds.

Vacancies: None

History.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Converted historic buildings and new development	2&3
Car parking	Adequate	Good
Access Trunk Roads	III. Secondary road separated from M5 etc by City Centre. Access reasonable	Medium
Access to Public transport	Not within 500 m of High Street but close to St David's Station. 15 –16 buses per hour (D,H, 50, 51,55, 56, 155,315, 355 & 379) within 500m	Good
Access to Shops etc	Not within 500 m of the High Street.	Poor
Proximity other Employment	Relatively isolated	Poor
Size	Varied size units. Some inflexibility	Medium
Prominence	Not easily seen.	Poor
Quality of Surroundings	Well planted surroundings with good views	Good
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Reasonably accessible from housing areas	Medium
Affect on Adjoining Areas	Some housing in vicinity. No known problems	Medium

Redevelopment/Improvement potential: Limited. Site contains mixture of modern and older Listed buildings.

Conclusions: A medium quality existing City Centre office site where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area.

No: 12 - Plan 8	**National House and adjacent office at Queen St/New North Rd**	**Area:** 0.16 ha (See also sites 4 & 5)

Description: Prominent vacant 1970s building. 4 floors 2000 sq m, of offices. Also 2 storey 1990s Central House in use as offices. Some basement parking.

Vacancies: Main building vacant

History: Main building vacant since 2004.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Older building with no recent occupiers	2
Car parking	20 spaces. Limited in relation to floorspace. Long and short stay parking in vicinity	Poor
Access Trunk Roads	On main route through City. Access restricted	Poor
Access to Public transport	Within 500m of High Street. Central Station is nearby	Good
Access to Shops etc	Within 500 m of High Street and Harlequin Centre and Guildhall shopping centre. Queen Street itself is an important shopping area.	Good
Proximity other Employment	Small site but various employment premises in vicinity	Medium
Size	Small with limited potential for sub-division	Poor
Prominence	High profile locally	medium
Quality of Surroundings	At junction of busy road. Some planting. Listed buildings nearby	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Some housing areas nearby including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	Some housing nearby. No problems.	Medium

Redevelopment/Improvement potential: Limited. High density office development.

Conclusions: A medium quality partially vacant existing City Centre office site. The loss of employment use could be considered if there are no good operational reasons for the remaining business that occupies the site to remain and there is no evidence of a need to retain employment opportunities in the area.

No: 13 - Plan 8	**Buildings at Queen Street/Richmond Road**	**Area:** 0.25 ha

Description: Substantial 4-5 storey Victorian terrace all converted to small offices except approx 2 flats, 2 restaurants and beauty parlour.

Vacancies: None.

History: Tend to be well utilized.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
SHADED AREAS RELATE TO PRIMARY REQUIREMENTS		
Quality of accommodation	Converted 19c buildings	2
Car parking	Some. Long and short stay parking in vicinity	Medium
Access Trunk Roads	Fronts Local Primary Road but access restricted.	Poor
Access to Public transport	Within 500m of High Street bus interchange and Central Station.	Good
Access to Shops etc	Within 500 m of High Street. Queen Street and the Harlequin and Guildhall shopping centres are also nearby.	Good
Proximity other Employment	Small site but various employment premises in vicinity	Medium
Size	Small with limited flexibility	Poor
Prominence	High profile locally	Medium
Quality of Surroundings	At junction of busy roads. Some planting.	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Accessible to large population including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	Some housing nearby but problems limited	Medium

Redevelopment/Improvement potential: Limited. Listed buildings.

Conclusions: A good/medium quality existing City Centre office site where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area.

No: 14 - Plan 8	**Rougemont and Castle St**	**Area:** 1.41 ha

Description: Former court complex comprising 18/19th Century listed building within grounds of castle remains in mixed temporary/unauthorized use. Victorian and early 20 Century buildings along Castle St.

Vacancies: Two buildings including parts of former court house vacant.

History: Law court has been vacant for some time.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Converted historic buildings	2
Car parking	Some parking. Potential for more parking but this could harm character of area. Public parking nearby.	Medium
Access Trunk Roads	Access via rear service road	Poor
Access to Public transport	Very close to the bus interchange in the High Street. The Bus and Coach Station and Central Station are also nearby	Very Good
Access to Shops etc	Close to primary shopping areas including the High Street, Princesshay and Gandy Street	Good
Proximity other Employment	Small isolated area. Some larger areas in vicinity	Medium
Size	Small. Some variety of accommodation.	Medium
Prominence	Low profile	Poor
Quality of Surroundings	Very attractive historic area adjoining gardens	Good
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Accessible to large population including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	Historically and visually important surroundings.	Medium

Other Considerations: The area is historically and culturally important.

Redevelopment/Improvement potential: Nil- Ancient Monument and listed buildings.

Conclusions: A good/medium quality existing City Centre office site where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area.

No: 15 - Plan 8	**Clarendon House, Western Way**	**Area:** 0.25 ha

Description: Substantial 5 storey mid 20th Century, DHSS building.

Vacancies: None.

History Planning permission for hotel on adjoining warehouse site.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Pre- 1974 office building.	2
Car parking	Limited but close to short and long stay car parks	Poor
Access Trunk Roads	On Western Way. Access to rear of site.	Good
Access to Public transport	Within 500m of the High and close to the Bus and Coach Stationbut separated from High Street by busy Western Way	Good
Access to Shops etc	Reasonably close to Princesshay, the High Street and Sidwell Street subject to crossing of Western Way.	Good
Proximity other Employment	Close to Southernhay and Summerland Street areas but separated from them by Western Way	Medium
Size	Small. Single large building	Poor
Prominence	Prominent on Western Way	Good
Quality of Surroundings	Between busy road and surface car park. Limited parking	Poor
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Accessible to large population including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	Adjoins housing. No significant problems	Medium

Redevelopment/Improvement potential: High density so little potential added value

Conclusions: A good/medium quality existing City Centre office site where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area.

No: 16 - Plan 8	**Mary Arches Street/Bartholomew St East – South Side**	**Area:** 0.14 ha (See also site 8)

Description: Late 20th Century 2 & 3 storey office buildings in use by NHS and jobs/training agency.

Vacancies: None.

History: Vacant floorspace here since 2000. Planning Permission for housing on part of site.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Mixture of conversion and new build	2-4
Car parking	Some. Little public long stay parking in area	Poor
Access Trunk Roads	On secondary route separated from M5 etc by City Centre.	Poor
Access to Public transport	Within 500m of High Street	Good
Access to Shops etc	Within 500m of High Street and close to secondary shopping in Fore Street and South Street.	Good
Proximity other Employment	Small isolated site. Other small sites nearby	Poor
Size	Small but with range of units. Inflexible	Poor
Prominence	Local presence	Medium
Quality of Surroundings	On busy road junction but adjoining historic buildings and open space	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Reasonably accessible to housing including deprived areas in vicinity of Sidwell St/Heavitree Road.	Medium
Affect on Adjoining Areas	Backs onto hotel and housing. Limited problems	Medium

Redevelopment/Improvement potential: Limited. Existing high density on confined site adjoined by listed buildings.

Conclusions: A good/medium quality existing City Centre office site where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area.

No: 17 - Plan 8	**Renslade House, Tudor Street**	**Area**: 0.37 ha

Description: 11 floor post war office building. Parking on ground floor. Relatively low rent.

Vacancies: 1 unit of 650 sq m capable of subdivision.

History: Planning Permission for extension not implemented.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Pre 1974 purpose made offices	2
Car parking	Some parking in basement and yard	Medium
Access Trunk Roads	Access onto Exe Bridges gyratory	Good
Access to Public transport	Just beyond 500m of High Street but 21 bus services per hour on Fore Street nearby. (A, E, F, P, 173, 359 &360)	Medium
Access to Shops etc	Slightly more than 500 m from High Street and separated from it by significant change in level. Fore Street nearby is secondary/specialist shopping area.	Poor
Proximity other Employment	Some employment uses nearby	Poor
Size	Single large building with several occupiers	Medium
Prominence	High profile in Exe Bridges	Good
Quality of Surroundings	Close to busy traffic intersections but good views riverside area	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Fairly accessible to housing areas	Medium
Affect on Adjoining Areas	No housing adjoins site.	Good

Redevelopment/Improvement potential: Limited. High density office building.

Conclusions: A good/medium quality existing City Centre office site where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area.

No: 18 - Plan 8	**BT offices, Commercial Road**	**Area:** 0.88 ha

Description: Recent building in full use as offices. 3 & 4 storey.

Vacancies: None

History: Some past interest in conversion to housing.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Purpose built offices built in 1980s	3
Car parking	Some parking problems. Short stay public parking nearby.	Medium
Access Trunk Roads	Secondary road with access onto Exe Bridges	Medium
Access to Public transport	Not within 500m of High Street but 21 bus services per hour on Fore Street nearby. (A,E,F,P, 173, 359 &360)	Medium
Access to Shops etc	Slightly more than 500 m from High Street and separated from it by significant change in level. Fore Street nearby is secondary/specialist shopping area.	Poor
Proximity other Employment	Isolated but some other employment sites in vicinity.	Poor
Size	Small but some scope for adaption/ subdivision	Medium
Prominence	On secondary road	Poor
Quality of Surroundings	In historic riverside section of City	Good
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Fairly accessible to housing areas	Medium

Other considerations: The site is just outside boundary of City Centre as defined by Local Plan First Review but is closely associated with the Centre functionally.

Redevelopment/Improvement potential: Limited. High density fairly recent buildings

Conclusions: A good/medium quality existing City Centre office site where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area.

K5: Existing City Centre Employment Areas and Sites not predominately in office use

No: K - Plan 8	**SUMMERLAND STREET AREA**	**Area:** 2.7 ha
Description: Extensive area developed early 20th Century as City Centre service industrial area.		
Vacancies: 1,500 sq m office vacant.		**Rents:** Low
History: Much of original industrial/storage accommodation converted or redeveloped to accommodate offices, quasi retail activities, a night club and housing. Outstanding planning permission for housing on part. Some redevelopment for housing and other uses.		

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Mainly purpose built before 1974	2
Car parking	Limited off street. On street in vicinity. Low for industry/warehouse use	Poor
Access Trunk Roads	Good access onto Western Way with its connections to M5 & Outer Bypass	Good
Access to Public transport	Close to High Street and Bus and Coach Station along a busy bus route	Good
Access to Shops etc	Close to High Street and adjoining secondary shopping in Sidwell Street	Good
Proximity other Employment	Extensive but fragmented employment area. Office areas nearby	Good
Size	Reasonable range of premises	Medium
Prominence	Prominent from Western Way	Medium
Quality of Surroundings	Secondary location in City Centre. Limited planting. Low quality or run down buildings	Poor
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Accessible to extensive high density housing areas including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	Some housing within area.	Medium

Redevelopment/Improvement potential: Area ripe for redevelopment. Only viable employment option is City Centre offices as part of mixed development potentially including housing, retail and leisure. Main constraints are the mix of ownerships and uses and precedents set by approvals for housing development

Conclusions: Poor quality existing area for industry/warehousing except insofar as it is necessary to serve the City Centre. Redevelopment including new offices a possibility.

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Site Appraisal: Redevelopment of Summerland Street to provide City Centre Offices (Shaded areas relate to primary requirements):

Heading	Notes	Summary
Quality of accommodation	Modern	5
Car parking	Set by policy. Area within easy walking distance of large long and short stay car parks	Good
Access Trunk Roads	Good access onto Western Way with its connections to M5 & Outer Bypass	Good
Access to Public transport	As for existing	Good
Access to Shops etc	As for existing	Good
Proximity other Employment	Fairly extensive. Possible fragmentation by inclusion of other uses	Good
Size	Reasonable range of office premises possible.	Good
Prominence	Prominent from Western Way. High profile for City Centre offices	Good
Quality of Surroundings	Redevelopment should facilitate some improvements	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	See above	Good

Conclusions: Revitalisation of the area should be encouraged including the provision of new office accommodation.

No: 19 - Plan 8	**Premises West of St David's Station**	**Area:** 0.51 ha

Description: Former railway buildings adjoining the tracks.

Vacancies: None

History.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Adaption of early 20c buildings	1-2
Car parking	On site spaces fully utilized	Medium
Access Trunk Roads	Narrow access onto busy road. Separated from trunk road system by the City Centre.	Poor
Access to Public transport	Close to St David's Station. (12 trains per hour). 5 buses per hour H, 56 & 379) in station forecourt	Good
Access to Shops etc	Near shops in St David's Station forecourt	Medium
Proximity other Employment	Small isolated site but offices proposed at station	Poor
Size	Small. Limited potential	Poor
Prominence	Low profile	Poor
Quality of Surroundings	Surrounded by railway land	Poor
Hi Tech Connections	Not known	
Access from Housing	Some housing within reasonable walking distance	Medium
Affect on Adjoining Areas	No vulnerable uses nearby	Good

Redevelopment/Improvement potential: Site very narrow and road access is poor. Not an attractive location for offices

Conclusions: A poor quality existing industry/warehouse site where the loss of employment use could be considered provided that there are no longer good operational reasons for the businesses that occupy the site to remain there and there is no evidence of a need to retain employment opportunities in the area. Redevelopment potential to provide offices limited

No: 20 - Plan 8	**BT building, Queen Street**	**Area:** 0.49 ha

Description: Telephone Exchange. Substantial purpose made 1970s telephone exchange with extensive parking areas.

Vacancies: None.

History:

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Fairly old building but adapted to current requirements	3
Car parking	Extensive on site car parks	Good
Access Trunk Roads	On main route through City Centre	Medium
Access to Public transport	Close to City Centre focus of City's public transport system	Good
Access to Shops etc	Close to City's primary shopping area	Good
Proximity other Employment	Several employment uses in vicinity. New North Road/Longbrook Street area within easy walking distance	Medium
Size	Large building but not probably not easily subdivided/converted for other users	Medium
Prominence	Prominent in Queen Street	Medium
Quality of Surroundings	Mixed area including railway, Rougemont Gardens and varied architectural styles. Some listed buildings	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Within easy walking distance of extensive housing areas including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	No vulnerable uses nearby	Good

Redevelopment/Improvement potential: Limited. Substantial specialised building on fairly small site. Return on redevelopment likely to be low.

Conclusions: A poor quality existing industry/warehouse site where the loss of employment use could be considered if there are no good operational reasons for the businesses that occupy the site to remain and there is no evidence of a need to retain employment opportunities in the area. Potential to redevelop to provide City Centre offices appears to be limited.

No: 21 - Plan 8	**Mary Arches Street/Bartholomew St East –North Side**	**Area:** 0.11 ha (see also site 9)

Description: Early 20th Century Pub + Kitchen installers and printers.

Vacancies: none

History.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Purpose made pre-1974	2
Car parking	Limited	Poor
Access Trunk Roads	Local Primary Road in City Centre	Medium
Access to Public transport	Close to High Street and Central Station	Good
Access to Shops etc	Close to High Street and Fore Street	Good
Proximity other Employment	Small area. Some employment uses nearby	Poor
Size	Small. Limited range opportunities	Poor
Prominence	Locally prominent	Medium
Quality of Surroundings	On busy road but adjoining open spaces. Historic buildings nearby	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Some housing areas nearby including deprived areas in vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	No vulnerable uses nearby	Good

Redevelopment/Improvement potential: Older buildings in good City Centre location. Main constraints are smallness of site and close relationship to busy road.

Conclusions: Poor quality existing area for industry/warehousing except insofar as it is necessary to serve the City Centre. Redevelopment including new offices a possibility.

Site Appraisal: Redevelopment of Mary Arches Street/Bartholomew St East –North Side to provide City Centre Offices (Shaded areas relate to primary requirements).

Heading	Notes	Summary
Quality of accommodation	Modern	5
Car parking	Increased up to policy requirements. Limited public long stay parking in vicinity.	Medium
Access Trunk Roads	Local Primary Road in City Centre	Medium
Access to Public transport	See above	Good
Access to Shops etc	See above	Good
Proximity other Employment	Small area. Some employment uses nearby	Poor
Size	Small. Limited range opportunities	Poor
Prominence	Locally prominent	Medium
Quality of Surroundings	On busy road but adjoining open spaces. Historic buildings nearby	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	See above	Good

Conclusions: Revitalisation of the area should be encouraged including the provision of new office accommodation.

No: 22 - Plan 8	**Market Street**	**Area**: 0.30 ha

Description: Mid 20c block comprising DCC social services offices/workshops (approx 30%) and leisure/retail. Mainly 2 storeys.

Vacancies: None

History.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Older buildings adapted to new uses	1-2
Car parking	Limited	Poor
Access Trunk Roads	On local primary road in City Centre	Medium
Access to Public transport	Close to High Street bus interchange	Good
Access to Shops etc	Close to High Street, Fore Street and South Street.	Good
Proximity other Employment	Small site. Easy walking distance of Southernhay	Medium
Size	Small. Limited range possible uses.	Poor
Prominence	Locally significant	Medium
Quality of Surroundings	Unattractive service areas	Poor
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Accessible to large residential population including deprived areas in vicinity off Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	Some housing nearby.	Medium

Redevelopment/Improvement potential: Older buildings in good City Centre location.

Conclusions:
Poor quality existing area for industry/warehousing except insofar as it is necessary to serve the City Centre. Redevelopment including new offices a possibility.

Site Appraisal: Redevelopment of Market Street to provide City Centre Offices
(Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Modern	5
Car parking	Increased to policy requirements. Long and short stay public parking in vicinity	Good
Access Trunk Roads	On Local Primary Road in City Centre	Medium
Access to Public transport	See above	Good
Access to Shops etc	See above	Good
Proximity other Employment	Small site. Easy walking distance of Southernhay	Medium
Size	Small. Limited range possible units	Poor
Prominence	Locally significant	Medium
Quality of Surroundings	Unattractive service areas	Poor
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	See above.	Good

Conclusions: Revitalisation of the area should be encouraged including the provision of new office accommodation.

No: 23 - Plan 8	**West Street/New Bridge Street**	**Area:** 0.25 ha

Description: Victorian shops backing onto early 20th Century converted showrooms. Most space used for sale of mechanical garden equipment. 4 floors

Vacancies: No

History: Previously motor showroom.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Adapted	1-2
Car parking	Limited but potential in building	Good
Access Trunk Roads	Fronts Western Way but access difficult	Medium
Access to Public transport	Within easy walking distance of High Street interchange and on busy St Thomas bus routes	Good
Access to Shops etc	Close to City Centre shopping areas including High Street. Adjoins shopping in New Bridge Street	Good
Proximity other Employment	Small isolated site but in City Centre. Other small sites nearby	Poor
Size	Limited conversion/subdivision potential	Poor
Prominence	Prominent from the Exe Bridges	Good
Quality of Surroundings	Fronts busy road but park beyond. Listed buildings in vicinity	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Fairly accessible from housing areas including deprived areas in vicinity of Sidwell St/Heavitree Road	Good
Affect on Adjoining Areas	Backs onto housing	Poor

Redevelopment/Improvement potential: Older buildings in prominent City Centre location. Main constraint is concern about protection of historic buildings, access and land assembly. Mixed development including retail and residential necessary for viability.

Conclusions: Not a good industry/warehouse site except insofar as needed to meet City Centre needs. Redevelopment including new offices a possibility.

Site Appraisal: Redevelopment of West Street/Fore Street to provide City Centre Offices (Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Modern. Some constraints arising from shape	4
Car parking	Parking needs could be met on lower levels	Good
Access Trunk Roads	Fronts Western Way but access difficult	Medium
Access to Public transport	See above	Good
Access to Shops etc	See above	Good
Proximity other Employment	Small isolated site but in City Centre. Other small sites nearby	Medium
Size	Could provide variety of small units	Poor
Prominence	Visible from Western Way	Medium
Quality of Surroundings	Fronts busy road but park beyond. Listed buildings in vicinity	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	See above	Good

Conclusions: Revitalisation of the area should be encouraged including the provision of new office accommodation.

No 24 - Plan 8	**Tudor Street/Frog Street**	**Area**: 0.25 ha

Description: Early 20th Century range of buildings, 1 to 2 storey in height used by building material suppliers, builders and a printer. Some parking. Adjoins Listed Tudor House.

Vacancies: None

History.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Various buildings adapted to different uses	1-2
Car parking	Sufficient	Good
Access Trunk Roads	Access from Western Way via Tudor St	Medium
Access to Public transport	Within reasonable walking distance of High Street. Adjoining busy St Thomas bus routes Sharp change in level from much of site to street level.	Good
Access to Shops etc	Close to local shopping in Fore Street. High Street within reasonable walking distance	Good
Proximity other Employment	Small isolated site but in City Centre. Other small sites nearby	Poor
Size	Small site but potential for variety of users	Poor
Prominence	Prominent from principal roads	Medium
Quality of Surroundings	Overshadowed back area but with green space and historic buildings nearby	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Fairly accessible from housing areas	Medium
Affect on Adjoining Areas	Listed buildings and residential adjoin site	Poor

Redevelopment/Improvement potential: Redevelopment to provide City Centre Offices as part of mixed development a possibility. Main issue is relationship with adjoining listed buildings.

Conclusions: Poor quality existing area for industry/warehousing except insofar as it is necessary to serve the City Centre. Redevelopment including new offices a possibility.

Site Appraisal: Redevelopment of Tudor Street/Frog Street to provide City Centre Offices. (Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Modern	5
Car parking	Subject to planning requirements. Limited public parking in vicinity	Good
Access Trunk Roads	Access from Western Way	Medium
Access to Public transport	As above	Good
Access to Shops etc	As above	Good
Proximity other Employment	Small isolated site but in Core Area. Other small sites nearby	Medium
Size	Small site but potential for variety of users	Poor
Prominence	Prominent from Western Way	Good
Quality of Surroundings	Overshadowed back area but with green space and historic buildings nearby	Medium
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	As above	Medium

Conclusions: Revitalisation of the area should be encouraged including the provision of new office accommodation.

K6: Proposed City Centre Office Areas

No: N - Plan 8	**St David's Station Car Parks**	**Area:** 0.40 ha

Description: Open Car park owned by Network Rail reserved for rail clients and leased to car parking operator.

History: Local Plan proposal for 7,600 sq m offices or student housing over retail maintaining the existing level of car parking for rail users and providing public transport interchange facilities. Offices first proposed for site in 1989. Some recent interest. Put forward as a priority location by the Devon Employment Strategy.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	May be limitations in light of requirement to provide station parking	Medium
Access Trunk Roads	Separated from trunk road system by the City Centre.	Medium/ Poor
Access to Public transport	Not close to High Street but adjoins main St David's Railway Station. 5 buses per hour in station forecourt	Good
Access to Shops etc	1100m from High Street. Near convenience shops in St David's Station forecourt.	Poor
Proximity other Employment	Isolated fairly small site	Poor
Size	Potential for variety of units	Good
Prominence	High visibility in Station Area	Medium
Quality of Surroundings	Within busy traffic circulation system.	Poor
Hi Tech Connections	Not known	
Access from Housing	Some housing within reasonable walking distance	Medium
Affect on Adjoining Areas	Could have impact on operation of station	Medium

Development Constraints: Major constraint is the need to find alternative location for railway car parks on the site.

Conclusions: Proposal to provide offices on the site should be reviewed.

No: P - Plan 8	**Land at Central Station Yard**	**Area:** 0.05 ha

Description: Cleared site adjoining recently completed flats and car park.

History: Planning permission for 2,250 sq m in November 2003. Developer seeking replacement with housing. Also approval sought for hotel development for which there is also a requirement in the City Centre. Detailed hotel proposals dismissed on appeal in 2008 but not specifically because of hotel use.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	Reserved spaces in adjoining public car park. Other public parking in vicinity	Medium
Access Trunk Roads	West of City Centre. Access concealed.	Medium/ Poor
Access to Public transport	Within easy walking distance of High Street bus stops and Central Station	Good
Access to Shops etc	Close to City Centre primary shopping area	Good
Proximity other Employment	Other small sites and New N Road/Longbrook Street area in vicinity	Medium
Size	Small. Limited flexibility	Poor
Prominence	Concealed	Poor
Quality of Surroundings	Hemmed in by other buildings and railway	Poor
Hi Tech Connections	ADSL & SDSL connections	Good
Access from Housing	Accessible to large population including from deprived area (Sidwell St/Heavitree Road)	Good
Affect on Adjoining Areas	Adjoins new residential development	Medium

Development Constraints: Part of mixed development of which remainder has been completed. Limited operational area has an affect on construction costs.

Conclusions: The proposal to provide offices on the site should be reviewed.

K7: Proposed Employment Areas other than for offices in the City Centre

No: Q - Plan 4	**Land west of Exeter Business Park**	**Area** 1.9 ha

Description: Small area adjoining Met Office. Area allocated by Local Plan First Review. Land east of the Business park has now largely been developed.

History: Allocated for employment by Local Plan First Review. Area remaining from development of Exeter Business Park.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone I. Approx 1.2 km to J30 via Exeter Business Park	I Medium
Access to Public transport	Reasonably accessible 9 buses per hour. Will also benefit from improvements to cross town routes.	Good
Access to Shops etc	None within reasonable walking distance	Poor
Proximity other Employment	Adjoins extensive Exeter Business Park	Good
Size	`medium	Medium
Prominence	Low profile	Poor
Quality of Surroundings	Between existing modern employment estate and potential development area	Medium
Hi Tech Connections	Connected to ADSL & SDSL.	Good
Access from Housing	Little within easy walking distance but likely to increase	Poor
Affect on Adjoining Areas	Limited amount of housing in vicinity	Good

Other Considerations: Access to land to the west could be provided through this area.

Development Constraints: No significant problems.

Conclusions: The proposal to provide employment on this site should be retained.

No: R - Plan 5	**Land off A379**	**Area:** 12.1 ha

Description: Undeveloped land on main spur road connecting to M5 at Junction 30.

History: Allocated for employment by the Local Plan First Review to meet the requirement for a science park. The presumption is that it will be allocated for employment use by the LDF in response to overall future need for employment land because provision is now being made for a science park in East Devon. Housing, community facilities and public transport improvements are also proposed south of the area by the Local Plan.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone I, Direct from A 379. Approx 1.2 km from J30	I Good
Access to Public transport	4 Buses per hour at Tesco just north of A379. Cross town route proposed through site.	Medium
Access to Shops etc	Tesco approx 300m to north	Good
Proximity other Employment	Large site	Good
Size	Large undeveloped site	Good
Prominence	Highly visible from A 379	Good
Quality of Surroundings	Rural setting with some views	Good
Hi Tech Connections	Not known	
Access from Housing	Existing housing to north. Proposed housing to south. Further housing anticipated in area	Good
Affect on Adjoining Areas	Limited amount of housing in vicinity	Good

Development constraints: Not significant. Need to prevent through traffic onto Old Rydon Lane.

Conclusions: The proposal to provide employment on this site should be retained.

K8: Potential Employment Areas on Previously Developed Land

No: S - Plan 8/9	**Railway land west of St David's Station**	**Area:** 5.9 ha

Description: Level area comprising mainly railway sidings, buildings and associated areas. Major constraints are current intensive use for railway purposes and poor road access.

History: Area identified by owners as available for housing development as part of SHLAA.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	Notes	Summary
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone III Separated from the trunk road system by the City Centre.	III Poor
Access to Public transport	Mainly within 500 m of St David's Railway Station 5 buses per hour	Good
Access to Shops etc	Mainly within 500 m of convenience stores at St David's station	Good
Proximity other Employment	Fairly large area but spread out. Offices proposed at St David's Station	Medium
Size	Scope for variety of unit sizes	Good
Prominence	Low profile	Poor
Quality of Surroundings	Mixed. Adjoins both riverside and railway	Medium
Access from Housing	Limited population in surrounding area	Poor
Affect on Adjoining Areas	Potentially visually intrusive on riverside frontage. HGV traffic through City Centre	Poor

Development Constraints: Site is below the level of, and divided by, Station Road onto which it has narrow frontages. Nearby is busy railway crossing

Conclusions: Area that should not be considered for additional employment development.

No: T - Plan 8	**Bus And Coach Station**	**Area:** 3.5 ha

Description: Bus Station and associated parking area; shopping frontage with service area and public car park constructed in 1960s.

History: Redevelopment of the Site has been the subject of proposals since the 1980s. The Local Plan First Review proposes an enhanced bus station, commercial leisure, retail floorspace, a street market, car parking and possibly non-family housing. A new cinema has been opened nearby reducing the requirement for commercial leisure use.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Good access to Western Way	Good
Access to Public transport	Within easy walking distance of High Street. Bus and Coach Station likely to be incorporated in the development	Good
Access to Shops etc	Close to High Street and Sidwell Street shopping areas. Retail likely to be included in any redevelopment.	Good
Proximity other Employment	Large site adjoining Southernhay but separated from it by busy road	Good
Size	Large site	Good
Prominence	Prominent from Western Way	Good
Quality of Surroundings	Unattractive at present but should form part of high quality comprehensive development	Medium
Access from Housing	Accessible to large population including deprived areas in the vicinity of Sidwell St/Heavitree Road.	Good
Affect on Adjoining Areas	. Some housing adjoins the site	Medium

Development Constraints: Major underground services pass through the area. The Bus and Coach Station needs to be replaced on the site.

Conclusions: Consideration should be given to the inclusion of offices in any proposals for the redevelopment of this site.

No: I - Plan 8	**Bonhay Road, Tudor Street**	**Area:** 0.45 ha

Description: Large metal clad mid 20th C former warehouse with extensive parking now used as health and fitness centre.

History: previously considered for housing.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Access from Western Way via Tudor St	Good
Access to Public transport	Some way from High Street and other transport interchanges but close to several bus routes with good frequencies	Medium
Access to Shops etc	Some distance from High Street and separated from it by a significant change in level. Fore Street, nearby is a secondary/specialist shopping street.	Medium
Proximity other Employment	Several small sites nearby	Medium
Size	Small site but potential for variety of users	Medium
Prominence	Prominent from principal roads	Medium
Quality of Surroundings	Overshadowed back area but with green space and historic buildings nearby	Medium
Access from Housing	High density housing in area but fairly dispersed.	Medium
Affect on Adjoining Areas	Some housing opposite site in Tudor Street	Medium

Development Constraints: Existing Use.

Conclusions: Consideration should be given to the inclusion of offices in any proposals for the redevelopment of this site.

No: U - Plan 11	**Exmouth Junction**	**Area:** 8.8 ha

Description: Level railway yard with rail sheds. Separated from highway by allotments. Part of area may have to be retained for rail operating companies.

History: Previous rail and associated use largely abandoned. May be affected by proposals for Rail Freight Interchange in East Devon and improvements to Exeter Salisbury railway line. Owners have put site forward for housing. Also some interest in use of part as a vehicle depot.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone III East of City Centre but some distance from M5 junctions and not directly accessible by Local Primary Roads	III Poor
Access to Public transport	8 bus per hour	Medium
Access to Shops etc	Most within 500m of Co-op supermarket to east	Good
Proximity other Employment	Fairly large site but isolated	Medium
Size	Good range of potential units	Good
Prominence	Low profile	Poor
Quality of Surroundings	Between railway and allotments	Poor
Affect on Adjoining Areas	Likely to increase HGV traffic through residential areas.	Poor
Access from Housing	Reasonably large accessible population including deprived areas in vicinity of Sidwell Street/Heavitree Road.	Medium

Development Constraints: Access via supermarket or allotments required. Contamination of parts of area.

Conclusions: Area that should not be considered for employment development.

No: V - Plan 5	**Bishops Court Quarry**	**Area:** 8.6 ha

Description: Steep sided promontory adjoining motorway junction.

History: Sand quarry currently being excavated.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone I. Approx 1Km J30 on M5 via Sidmouth Road and estate road.	I Medium
Access to Public transport	13 buses per hour + Digby Sowton Rail Halt in or near 500m of site.	Good
Access to Shops etc	No convenience store within 500m	Poor
Proximity other Employment	Medium size adjoining Sowton Industrial Estate	Good
Size	Medium size. Good range of possible sites	Good
Prominence	Not easily visible from A 379. Access from north.	Poor
Quality of Surroundings	Quarry. Planted surrounds. Long views	Medium
Access from Housing	On edge of housing area. Some potential housing areas to south	Poor
Affect on Adjoining Areas	No vulnerable uses in vicinity.	Good

Other Considerations: Within a Site of Local Interest for Nature Conservation. Not Medium landscape capacity for employment use. Not covered by landscape capacity study but nearby similar areas have medium landscape capacity for employment development.

Development Constraints: Protection of natural habitats.

Conclusions: Area that should be considered for employment development.

K9 Potential Employment Areas on Greenfield Land

No: W1 - Plan 4	**Monkerton**	**Area:** 30.4 ha
Description: Previously undeveloped land on either side of new link road. Parts prominent.		

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	Good
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone I Access off new road linking Honiton and Pinhoe Roads	I Medium
Access to Public transport	7 to 15 buses per hour depending on location. Improved cross town links and new high capacity route planned.	Medium to good
Access to Shops etc	Parts accessible to Sainsbury's	Poor to medium
Proximity other Employment	Adjoins Exeter Business Park	Good
Size	Large	Good
Prominence	Prominent from new road	Medium
Quality of Surroundings	Rural. Some good views	Good
Access from Housing	Little housing nearby at present. Major developments likely.	Medium
Affect on Adjoining Areas	No adjoining vulnerable uses.	Good

Other Considerations: Medium landscape capacity for employment use. Concern about development on the skyline. Potential for housing.

Development Constraints: No significant problems.

Conclusions: Area that should be considered for employment development.

No: W2 - Plan 4	**Hill Barton**	**Area:** 23.1 ha

Description: Open, previously undeveloped agricultural land, parts of which are steep and prominent locally.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Zones I & II Access via Exeter Business Park and Q3	I & II medium
Access to Public transport	4 to 5 buses per hour accessible from parts of area	Poor
Access to Shops etc	Part within 500m of Sainsburys.	Medium/ Poor
Proximity other Employment	Adjoins Exeter Business Park	Good
Size	Large	Good
Prominence	No main road frontages	Poor
Quality of Surroundings	Rural with views from some locations	Good
Affect on Adjoining Areas	Housing to west overlooking area	Medium
Access from Housing	Not accessible to large population	Poor

Other Considerations: Medium landscape capacity for employment use. Some concern about development on skyline**.**

Development Constraints: Access required via proposed and potential employment sites.

Conclusions: Area that should be considered for employment development.

No: W3 - Plan 4	**Honiton Road**	**Area:** 5.1 ha

Description: Elevated previously undeveloped site adjoining main road.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	5
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone I. Fronts onto direct route to J29	I Good
Access to Public transport	9 buses per hour on Honiton Road. Improvements to cross town routes planned	Good
Access to Shops etc	No shops within 500m	Poor
Proximity other Employment	Adjoins Exeter Business Park	Good
Size	Medium size. Good scope for variety of units	Medium
Prominence	High profile site on main route to M5 junction	Good
Quality of Surroundings	Adjoins busy road and existing recent development.	Medium
Access from Housing	Accessible to small population.	Poor
Affect on Adjoining Areas	Adjoins small area of housing to west	Good

Development Constraints: Change in level between site and Honiton Road may affect access design.

Other Considerations: Medium landscape capacity for employment use.

Conclusions: Area that should be considered for employment development.

No: W4 - Plan 4	**Land East of Monkerton**	**Area:** 12.0 ha

Description: Low lying previously undeveloped land between motorway and housing area.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	Good
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone II Small parts within I. Access through other potential development areas	II Medium
Access to Public transport	7 buses per hour within 500m. Proposals for substantial improvements.	Good
Access to Shops etc	No shops within 500m	Poor
Proximity other Employment	Large area. Adjoins potential employment areas	Good
Size	Large. Potential for wide range of units	Good
Prominence	Visible from M5 but access indirect and from west.	Poor
Quality of Surroundings	Between suburban housing and motorway	Medium
Access from Housing	Limited existing or potential housing in vicinity	Poor
Affect on Adjoining Areas	Housing adjoins to west	Medium

Other Considerations: Low landscape capacity for employment use. Flood risk on part.

Development Constraints: Access dependant upon development of W1. Flood mitigation measures will be required.

Conclusions: Area that should not be considered for employment development.

No: X1 - Plan 5	**St Bridget Nurseries**	**Area:** 13.6 ha

Description: Extensively planted market garden in fairly prominent location.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	Good
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone II, Almost I. Direct access onto A 379	II Good
Access to Public transport	4 Buses per hour at Tesco just north of A379. Cross town route proposed near site.	Medium /Good
Access to Shops etc	Tesco approx 300m to north	Good
Proximity other Employment	Large site near proposed site to east	Good
Size	Large. Scope for wide range of units	Good
Prominence	Highly visible from A 379	Good
Quality of Surroundings	Rural setting with some views	Good
Access from Housing	Existing housing to north. Proposed housing to east.	Poor
Affect on Adjoining Areas	Some housing nearby	Medium

Development Constraints: None significant. Access may need to be shared with adjoining proposed employment land.

Other Considerations: Medium/low landscape capacity for employment use.

Conclusions: Area that should not be considered for employment development.

No: X2 Plan 5	**Sandy Park Farm**	**Area:** 7.1 ha

Description: Previously undeveloped land adjoining new rugby club premises. Access available from A 379 at lower level close to M5 junction 30. Adjoining area to east recently developed as rugby ground.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	Good
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone I. All within 1km of J30 on M5 with direct access onto A 379.	Good
Access to Public transport	Within 500m of proposed cross town bus route and possible other services	Medium /Good
Access to Shops etc	May be accessible to proposed shop on RNS site to west	Poor
Proximity other Employment	Adjoins proposed employment area	Good
Size	Medium. Good range of units possible	Medium
Prominence	Highly visible from A 379	Good
Quality of Surroundings	Reasonably attractive. Good views	Medium
Access from Housing	Some housing proposed to west	Poor
Affect on Adjoining Areas	Some housing in vicinity	Medium

Other Considerations: Medium landscape capacity for employment use. Some difficulty in providing satisfactory road access to A 379.

Constraints: Concern whether existing access onto A 379 suitable for additional development on this scale.

Conclusions: Area that should be considered for additional employment development.

No: X3 Plan 5	**Land South of Sandy Park Farm and Old Rydon Lane East of Railway**	**Area:** 11.9 ha

Description: Roughly triangular previously undeveloped area sloping gently towards motorway.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	Good
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone II Part within 1.5 km of J30 on M5 but significant access constraints	II Medium
Access to Public transport	Not within 500 m existing bus routes. Possible future route along Old Rydon Lane	Medium/Poor
Access to Shops etc	Not within 500m of existing or proposed convenience store	Poor
Proximity other Employment	Medium sized. Proposed and potential employment sites nearby	Good/Medium
Size	Medium sized. Wide range of units possible	Good
Prominence	Prominent from M5.	Good
Quality of Surroundings	Between railway and motorway. Countryside beyond	Medium
Access from Housing	Little existing or possible future housing in vicinity	Poor
Affect on Adjoining Areas	Some housing in vicinity. Potential HGV traffic on Rydon La.	Medium

Other Considerations: Medium landscape capacity for employment use.

Development Constraints: Potential access problems. May be limit on capacity able to reach A379 via X2 to north. Access via Old Rydon Lane may be unsatisfactory for environmental as highway reasons.

Conclusions: Area that should be considered for employment development.

No: Y Plan 10	**Land N of Topsham Rd west of M5**	**Area:** 26.23 ha

Description: Level area between housing and motorway crossed by two power lines. Some flooding risk associated with brook passing through area.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
SHADED AREAS RELATE TO PRIMARY REQUIREMENTS		
Quality of accommodation	Modern	Good
Car parking	As required subject to policy	Good
Access Trunk Roads	On outer edge of zone II	II Poor
Access to Public transport	7 buses per hour	Good
Access to Shops etc	No shops within 500m	Poor
Proximity other Employment	Large site. No other proposed/potential employment areas nearby	Good
Size	Large. Wide range of potential plot sizes available	Good
Prominence	From Local Primary Road only	Medium
Quality of Surroundings	Adjoins motorway. Golf course and planted areas nearby	medium
Access from Housing	Not accessible to large amount of housing. Some housing proposed nearby.	Poor
Affect on Adjoining Areas	Limited housing in vicinity	Good

Other Considerations: The landscape has high/medium capacity to accommodate employment development. Part of the area is affected by flood risk.

Development Constraints: Overhead power lines and flooding from brook.

Conclusions Area that should not be considered for employment development.

No: Z Plan 6	**Matford Park**	**Area:** 6.4 ha

Description: Level field adjoining existing trading estate. Part of larger area. Significant flood risks.

Site Appraisal (Shaded areas relate to primary requirements)

Heading	**Notes**	**Summary**
Quality of accommodation	Modern	Good
Car parking	As required subject to policy	Good
Access Trunk Roads	Zone II. Close to Outer Bypass. Southerly end but good connection to A38 & A 30 to west	II Medium
Access to Public transport	Accessible to P&R, 6 buses per hour	Medium
Access to Shops etc	None in vicinity	Poor
Proximity other Employment	Adjoins large well established Marsh Barton Estate	Good
Size	Medium size. Good range of development options	Good
Prominence	Prominent from bypass and on man route into City	Medium
Quality of Surroundings	Attractive rural setting	Good
Access from Housing	No housing nearby	Poor
Affect on Adjoining Areas	Visual impact only	Good

Other Considerations: The area is subject to flood risk and its development may have an impact on important wildlife habitats. The landscape has a high/medium capacity to accommodate employment development.

Development Constraints: Development area may be reduced by requirement for flood alleviation measures and access improvements.

Conclusions: Area that should be considered for employment development.

APPENDIX L: LIST OF IDENTIFIED AREAS AND SITES

Name of Area or Site	No.	Plan No.	Description
Exeter Business Park	A	2,3&4	Existing Employment Areas - Zone I
Sowton	B	2&3	
Pinhoe	C	2&4	Existing Employment Areas and Sites - Zone II
Peninsula Park	D	2&5	
Pynes Hill	E	2&5	
Marsh Barton	F	2,6&7	
Matford	G	2&6	
Harrington Lane/Brickworks Area	H	2&4	Existing Employment Areas - Zone III
Haven Banks/Water Lane Area	J	2&7	
Summerland Street Area	K	2,8&11	Existing City Centre Employment Area not predominately in office use
New North Road/Longbrook Street	L	2,8&9	Existing City Centre Office Areas
Southernhay	M	2&8	
BT Depot, Main Road, Pinhoe	1	4	Existing Employment Sites – Zone II
Garage Main Rd Pinhoe	2	4	
Western Road, St Thomas	3	7/8	Existing Employment Sites – Zone III
Wippells, Buller Road	4	7/8	
Larkbeare, Topsham Road	5	7/8	
Exwick Mill, St Andrew's Road	6	9	
Laundry, Cowley Bridge Road	7	9	
Yeo and Davey, Old Tiverton Road	8	8/11	
Retreat Boatyard, Topsham	9	10	
BT Building Off Station Rd Topsham	10	10	
St David's Hill	11	8/9	Existing City Centre Office Sites
National House, Queen Street	12	8/9	
Buildings at Queen Street/Richmond Rd	13	8/9	
Rougement and Castle St	14	8/9	
Clarendon House, Western Way	15	8/11	
Mary Arches St, South	16	8	
Renslade House, Tudor Street	17	7/8	
BT Offices, Commercial Road	18	7/8	

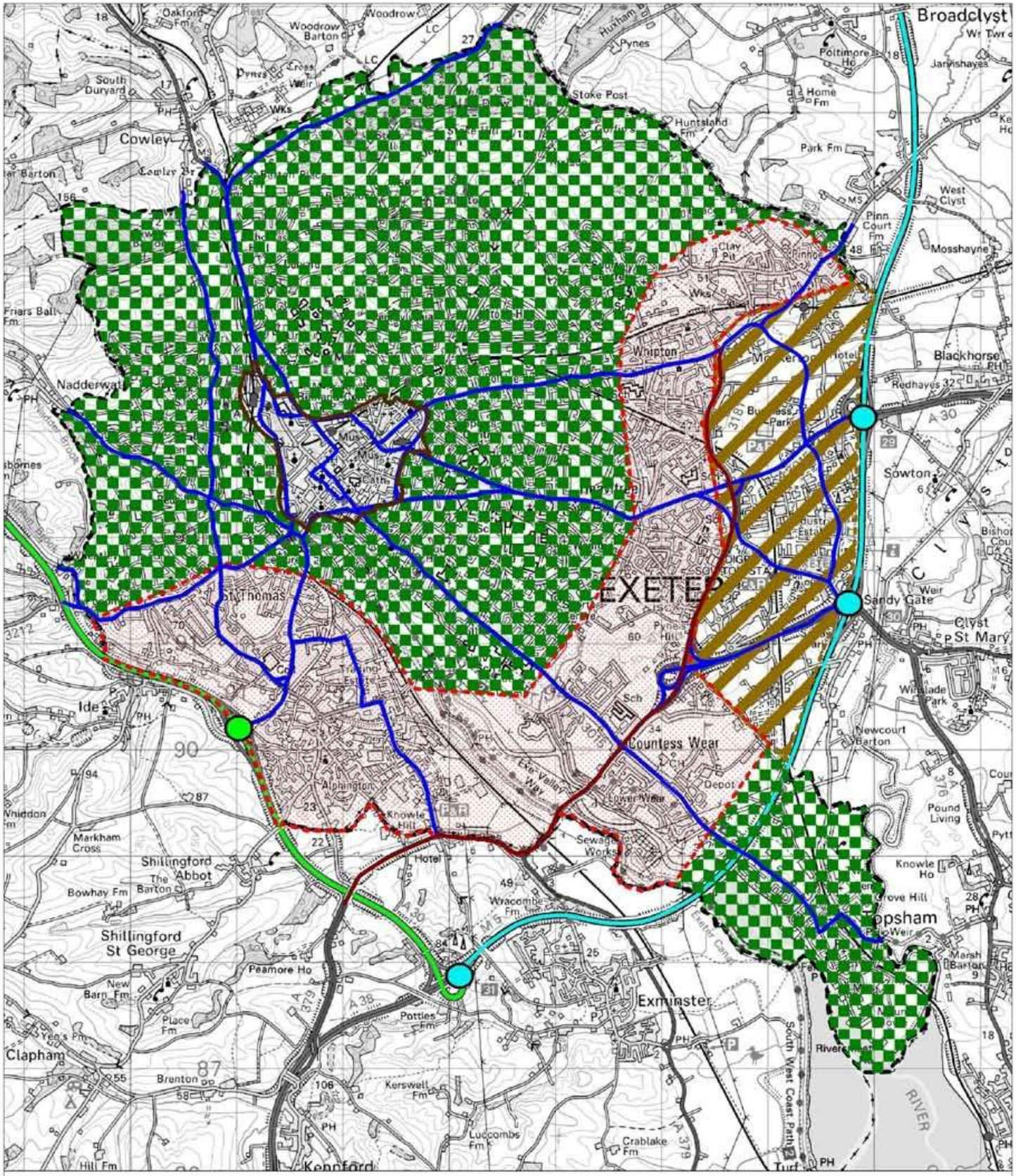
Name of Area or Site	No.	Plan No.	Description
Premises West of St David's Station BT Building, Queen Street Mary Arches St North Market St West St/Fore Street Tudor St/Frog Street	19 20 21 22 23 24	8/9 8/9 8 7/8 7/8 7/8	Existing City Centre Employment Sites, not predominately in office use
St David's Station Car Parks Central Station Yard	N P	8&9 8&9	Proposed City Centre Office Areas
Land West of Exeter Business Park Land South of the A379	Q R	3&4 5	Proposed Employment Areas other than for offices in the City Centre
Railway Land West of St David's Station Bus and Coach Station Bonhay Road/Tudor Street Exmouth Junction Bishops Court Quarry	S T I U V	8&9 8 7&8 11 3&5	Potential Employment Areas on Previously Developed Land
Monkerton Hill Barton Honiton Road Land East of Monkerton St Bridget Nursery Sandy Park Farm South of Sandy Park Farm North of Topsham Rd West of the M5 Matford Park	W1 W2 W3 W4 X1 X2 X3 Y Z	4 3&4 3&4 4 5 5 5 10 6	Potential Employment Areas on Greenfield Land

GLOSSARY

DCLG	Department of Communities and Local Government
ELR	Employment Land Review
ICT	Information and Communication Technology
IT	Information Technology
LDF	Local Development Framework
ODPM	Office of the Deputy Prime Minister
ONS	Office of National Statistics
R&D	Research and Development
RES	The South West Regional Economic Strategy
SWRSS	Regional Spatial Strategy for the South West
SHLAA	Strategic Housing Land Availability Assessment
SPD	Supplementary Planning Document
SSCT	Strategically Significant Cities and Towns
SWRA	South West Regional Assembly
SWRDA	South West Regional Development Agency
TTWA	Exeter Travel to Work Area

PLANS

1-2 Key Plans
3-11 Locations of Employment Areas and Sites



Plan 1

- Zone I
- Zone II
- Zone III
- Principal Local Roads
- Outer Bypass
- M5
- A30
- City Boundary
- City Centre Boundary
- M5 Junction
- A30 Junction

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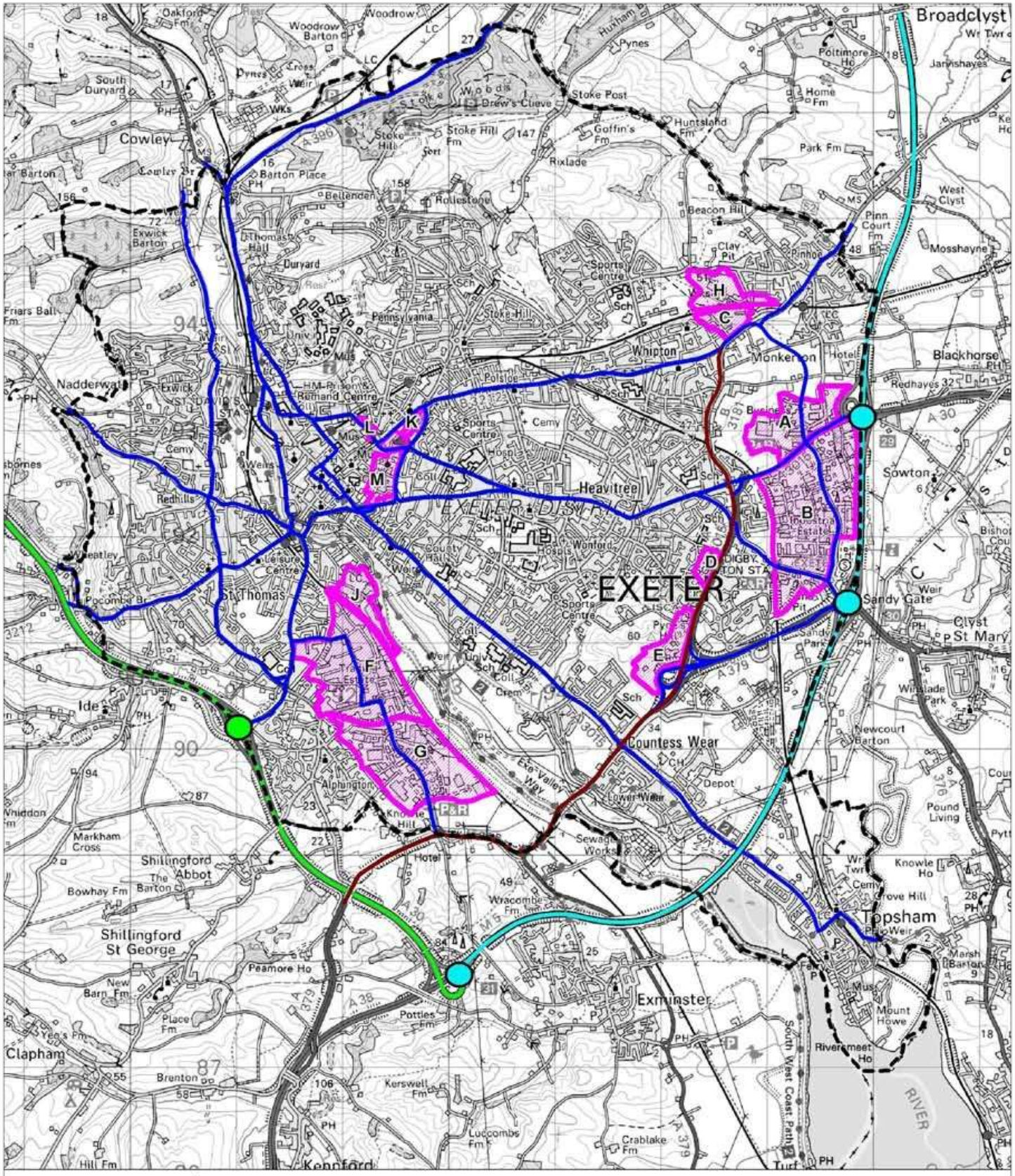

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Plan 2

- A — Existing Employment Areas
- City Boundary
- Principal Local Roads
- Outer Bypass
- M5
- A30
- M5 Junction
- A30 Junction

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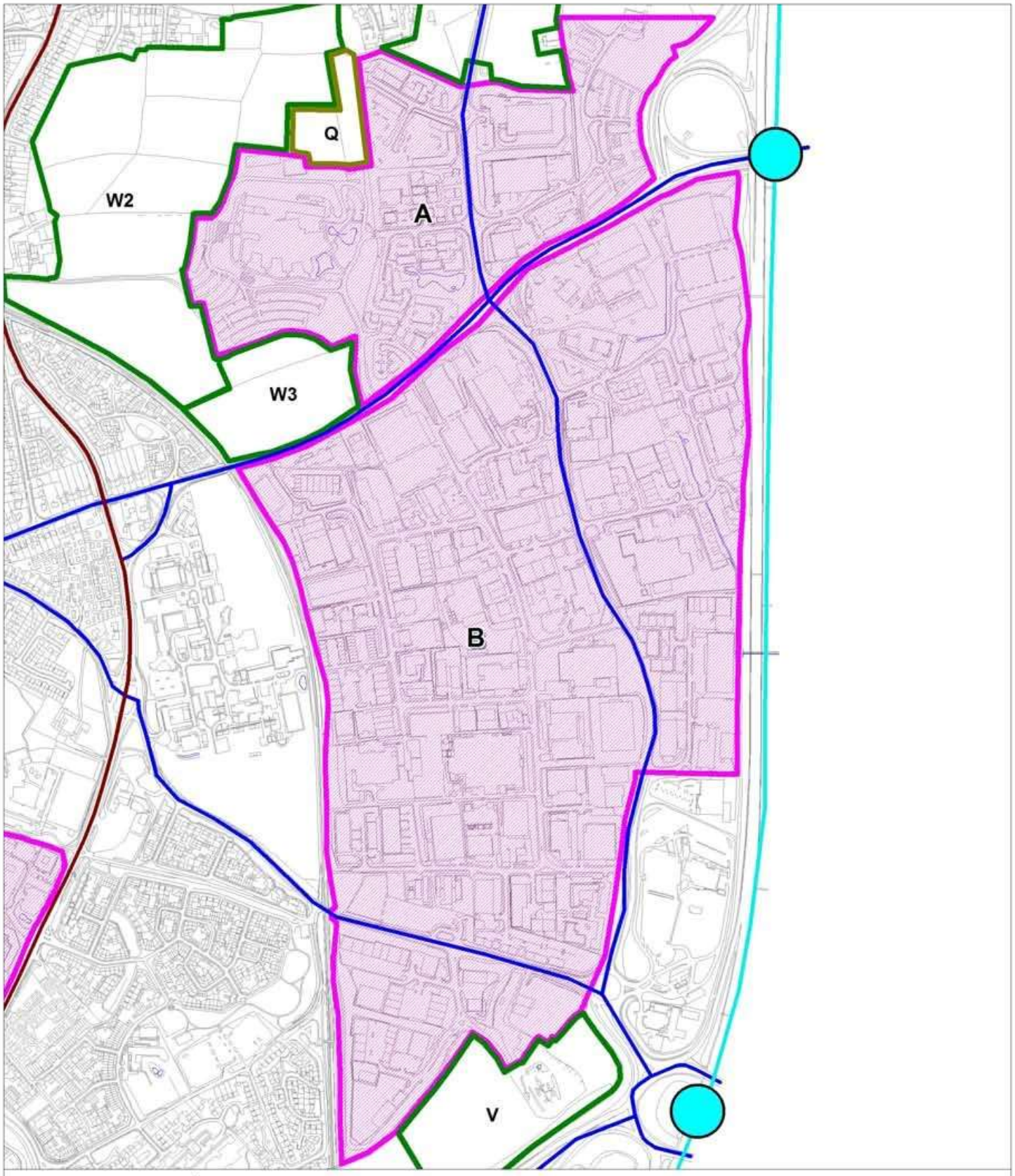

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Plan 3

- A Existing Employment Areas
- Q Proposed Employment Area
- V Potential Employment Areas
- Principal Local Roads
- Outer Bypass
- M5
- M5 Junction

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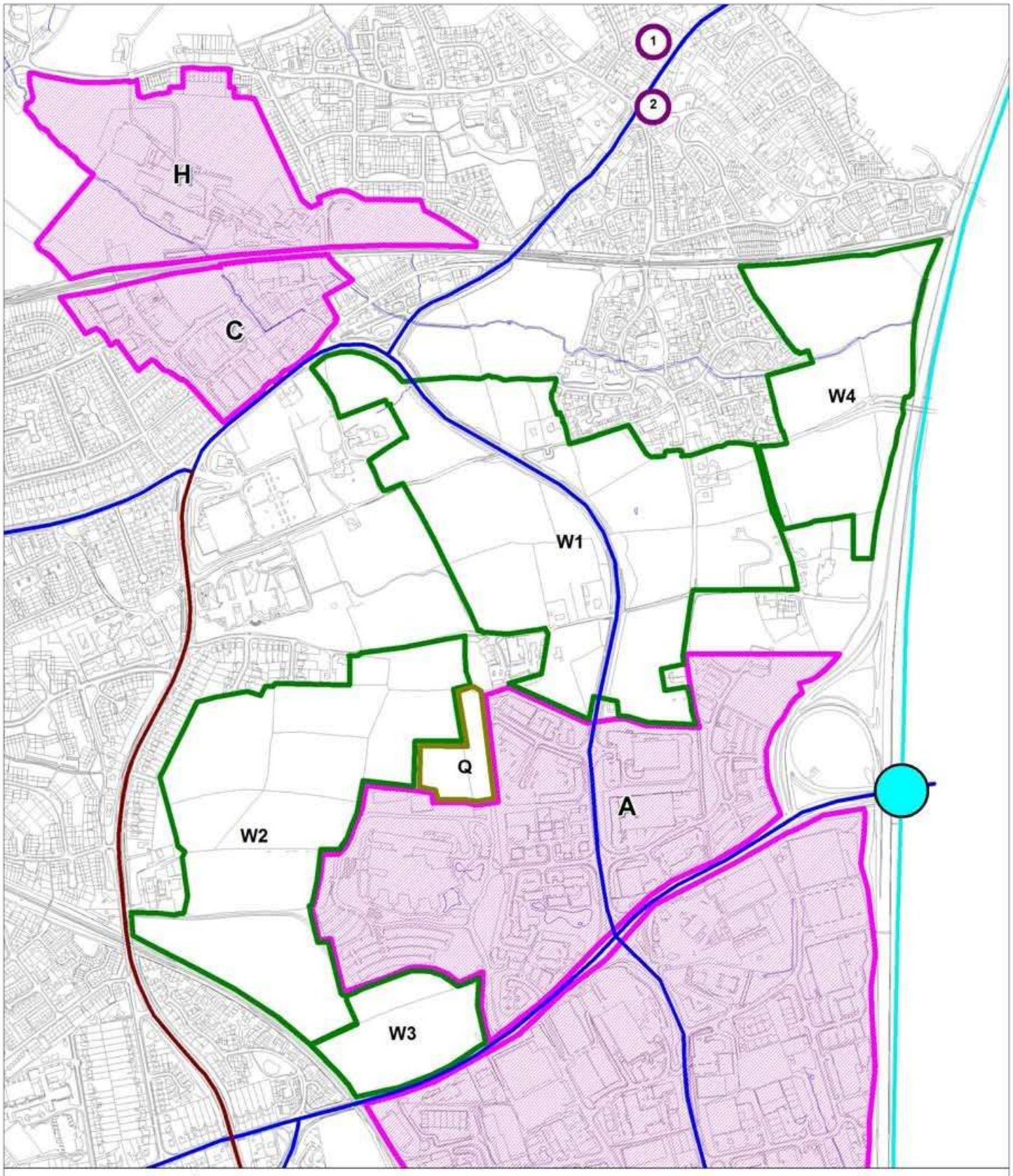

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Plan 4

- A — Existing Employment Areas
- 5 — Existing Employment Sites
- Q — Proposed Employment Area
- W — Potential Employment Areas
- Principal Local Roads
- Outer Bypass
- M5
- M5 Junction

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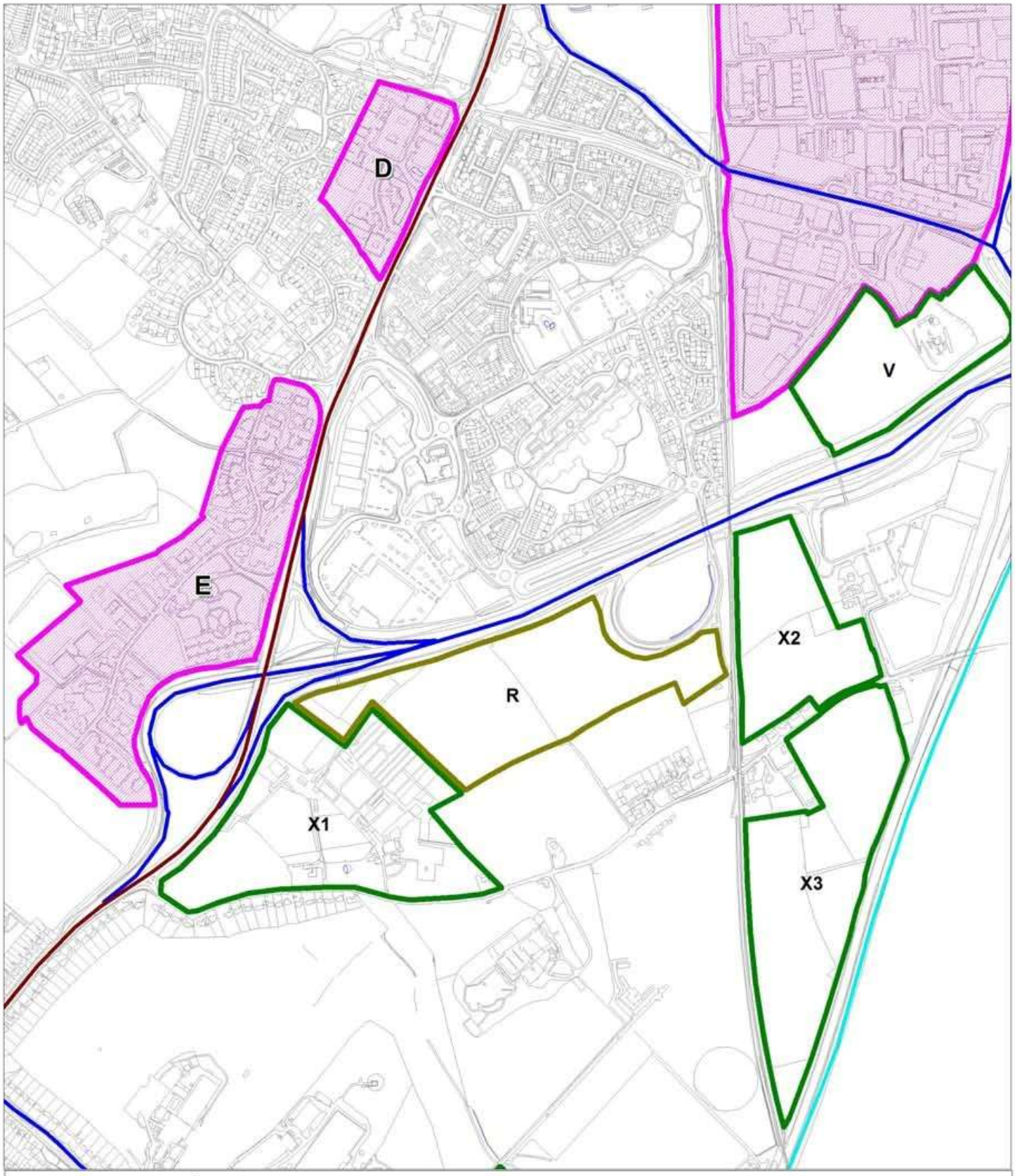

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Plan 5

- E — Existing Employment Areas
- R — Proposed Employment Area
- V — Potential Employment Areas
- Principal Local Roads
- Outer Bypass
- M5

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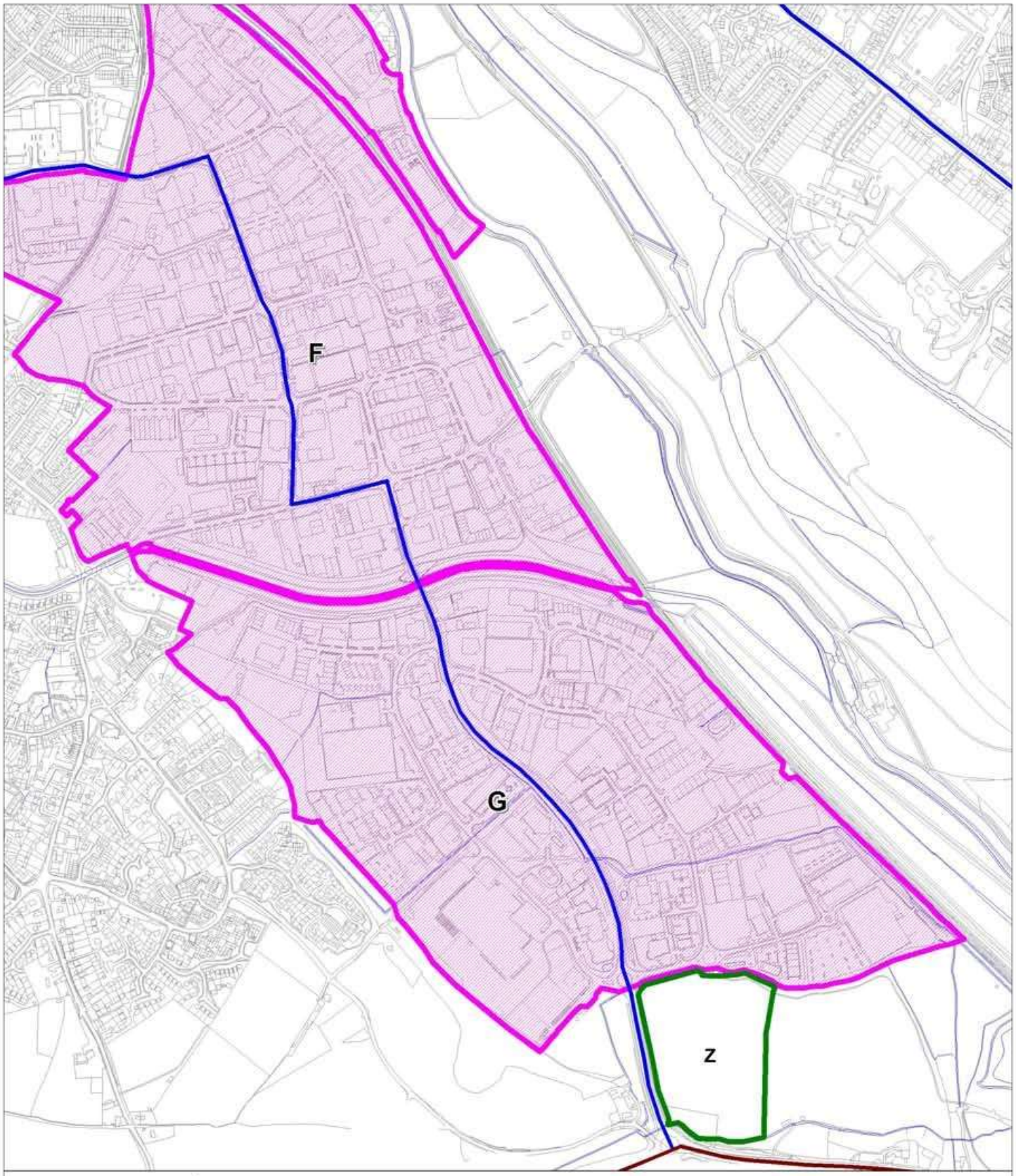

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Plan 6

G Existing Employment Areas

Z Potential Employment Area

Principal Local Roads

Outer Bypass

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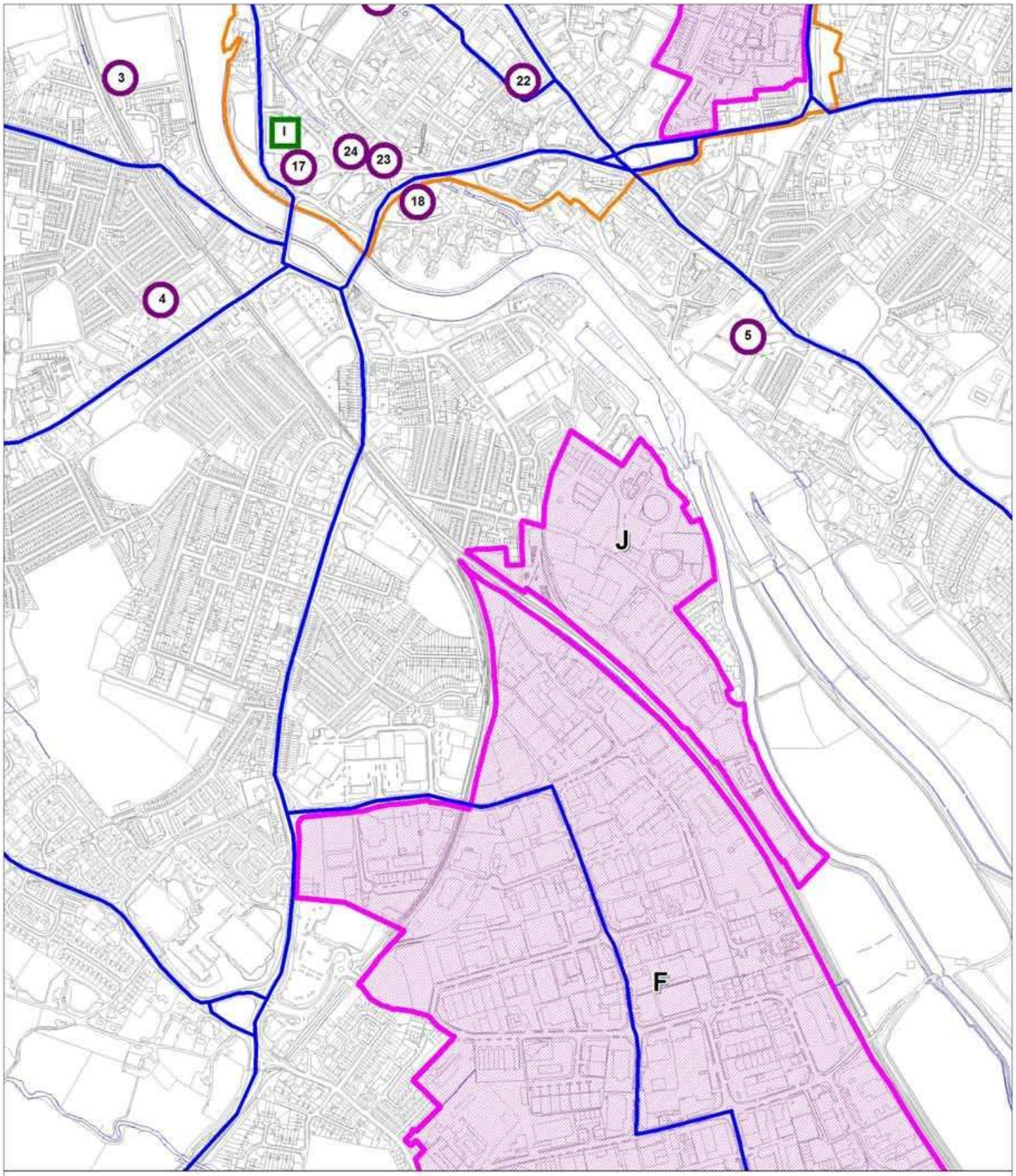

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Plan 7

J Existing Employment Areas

5 Existing Employment Sites

I Potential Employment Area

Principal Local Roads

City Centre Boundary

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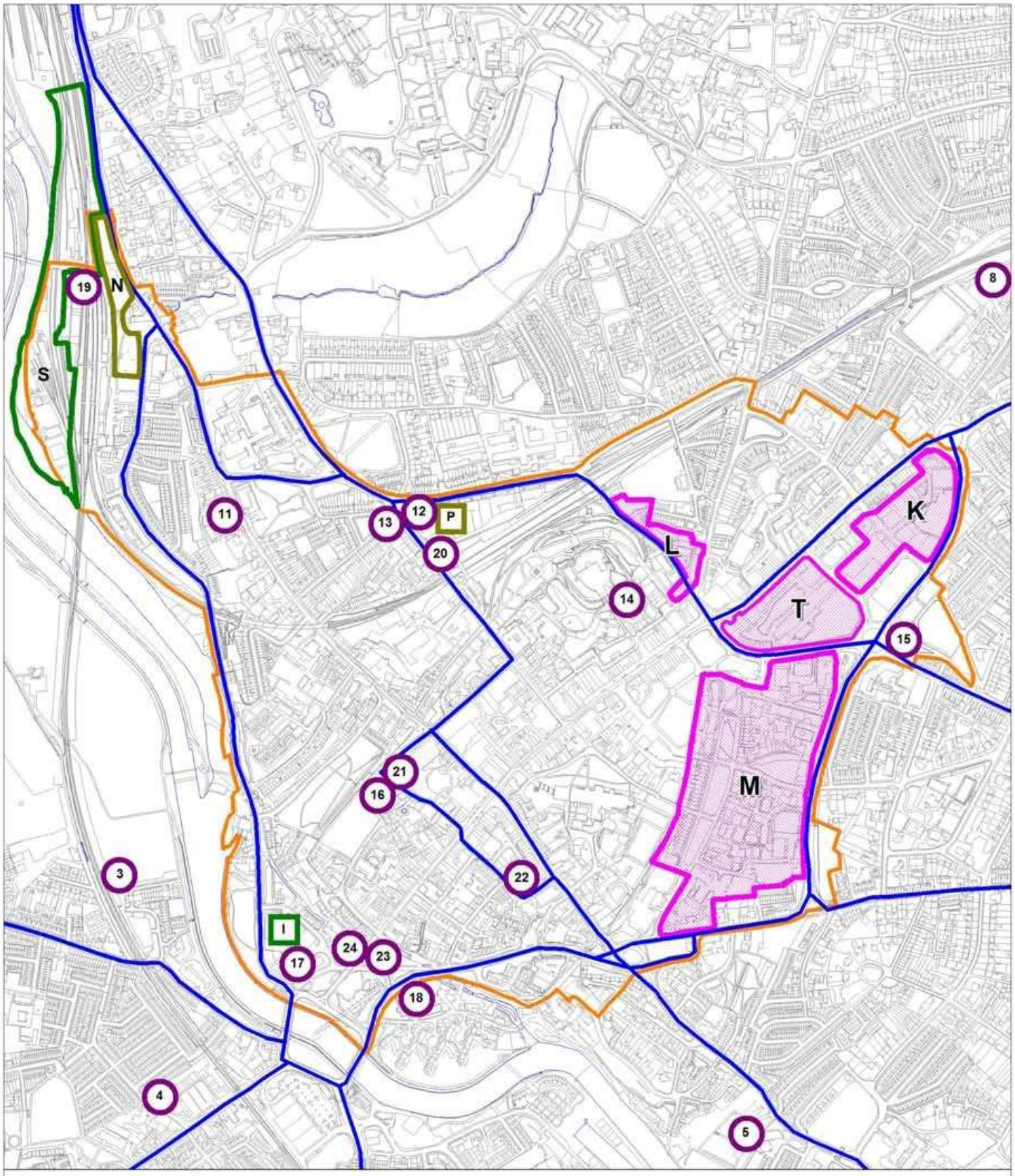

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Plan 8

M	Existing Employment Areas	S	Potential Employment Areas
5	Existing Employment Sites	—	Principal Local Roads
N	Proposed Employment Areas	—	City Centre Boundary

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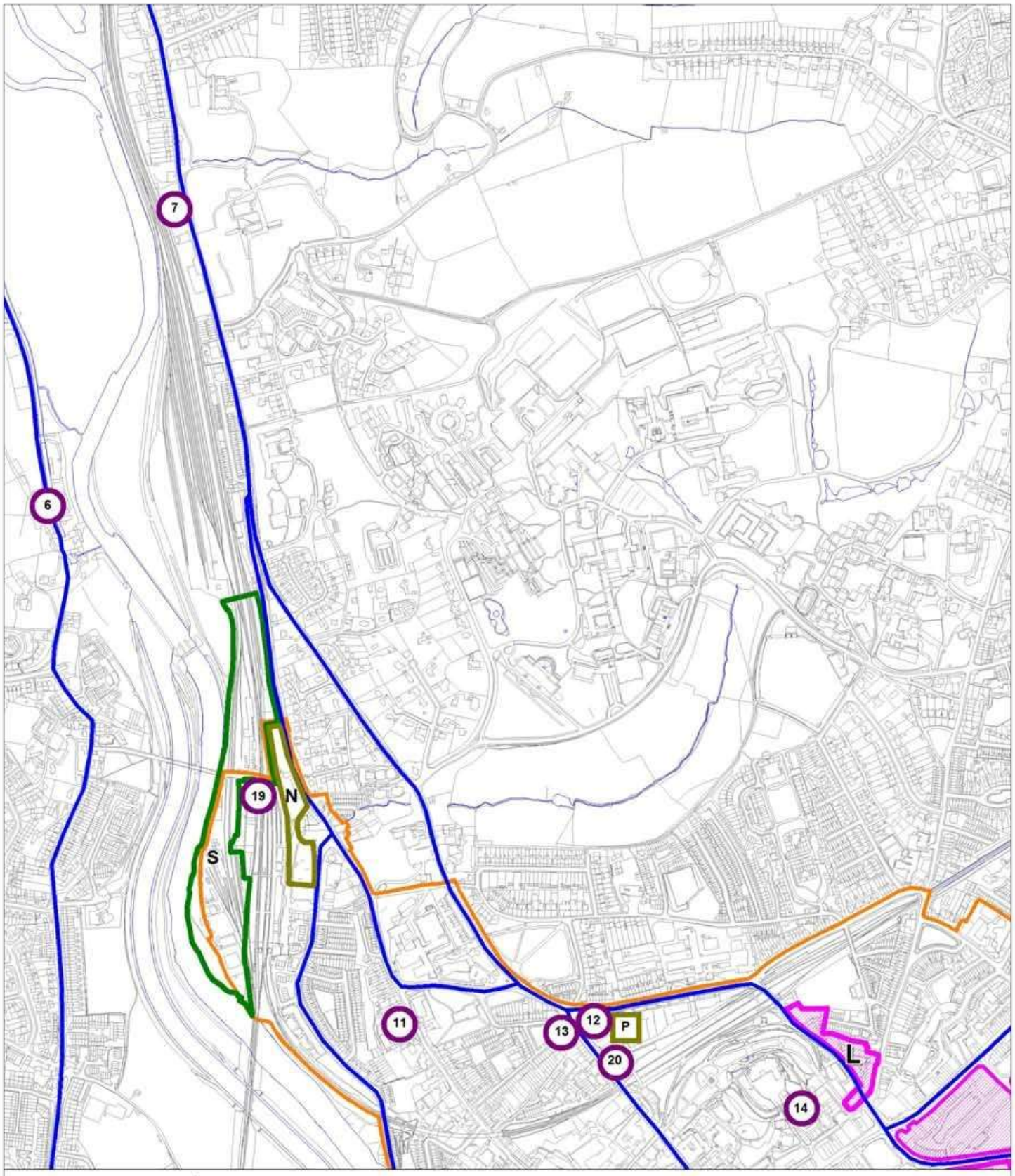

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Plan 9

- L — Existing Employment Areas
- 5 — Existing Employment Sites
- N — Proposed Employment Areas
- S — Potential Employment Area
- Principal Local Roads
- City Centre Boundary

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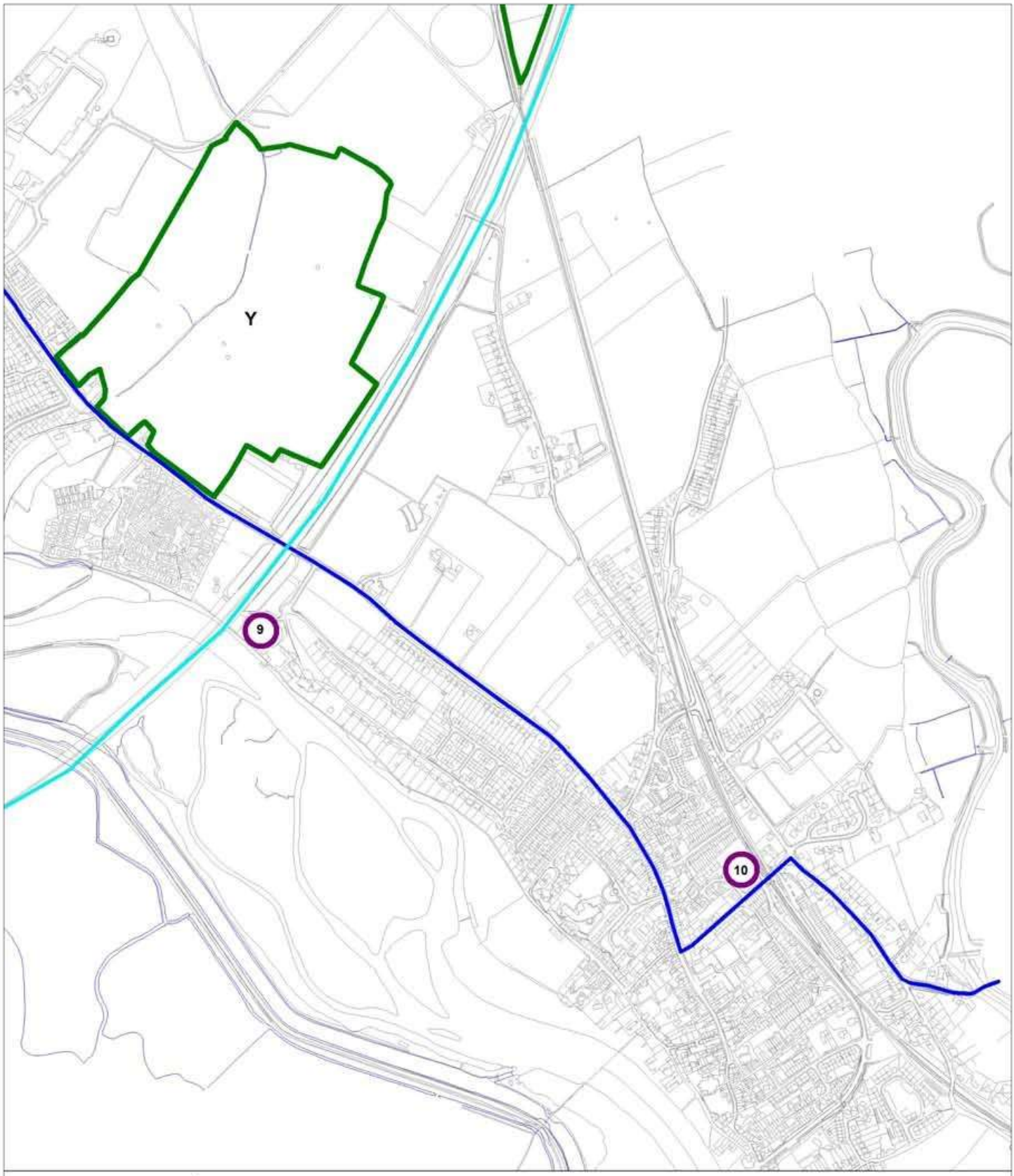

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Plan 10

9 Existing Employment Sites

Y Potential Employment Area

Principal Local Roads

M5

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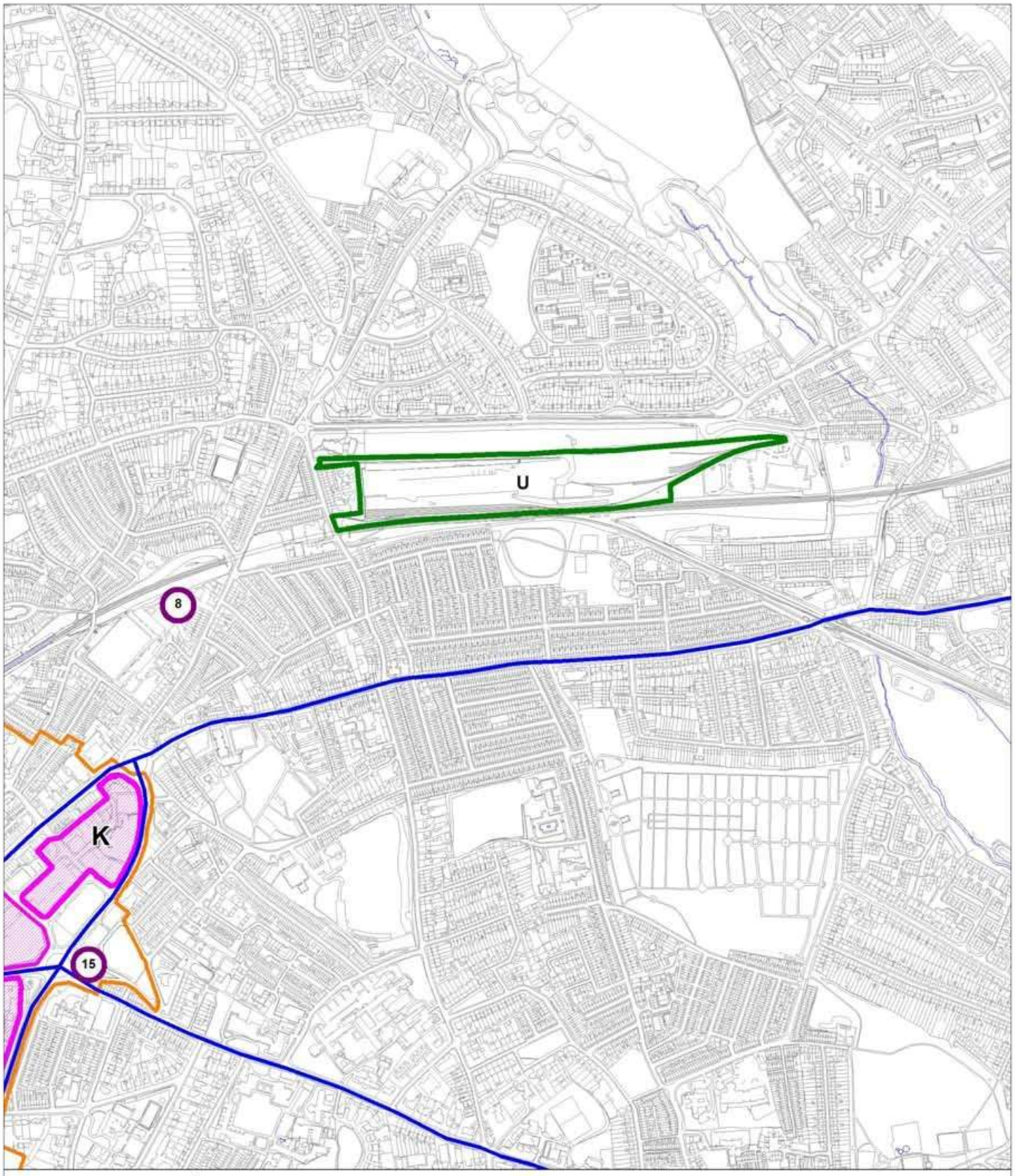

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Plan 11

- K — Existing Employment Areas
- 8 — Existing Employment Sites
- U — Potential Employment Area
- Principal Local Roads
- City Centre Boundary

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