



**Lambert
Smith
Hampton**

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Employment Land Study

covering

Eastleigh

on behalf of

Southampton City Council and

Eastleigh Borough Council

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1.0 EXECUTIVE SUMMARY

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

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

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

1.1 Eastleigh Borough site reviews

Reference	Site name/address	Grade A-E	Quality
E11	Nelson Industrial Park	A	High
E14	Southampton Airport Business Park	A	
E18	Waterloo Industrial Park	A	
E22	Royal London Park	A	
E26	Flanders Industrial Park	A	
E1	Chandlers Ford Industrial Estate	B	Above average
E2	Northern Business Park	B	
E3	Woodside Avenue Industrial Estate	B	
E9	Tollgate Business Park	B	
E13	Boyatt Wood/Parham Drive Industrial Estate	B	
E15	Botleigh Grange Office Campus	B	
E16	Land at Ageas Bowl	B	



Reference	Site name/address	Grade A-E	Quality
E28	Stoneham Place	B	Average
E31	Southampton Road Offices	B	
E4	Railway Works	C	
E7	Barton Park Industrial Estate	C	
E10	Ensign Way	C	
E17	Port Hamble Marina	C	
E20	Solent Industrial Estate	C	
E30	Deacons Boat Yard	C	
E19	Netley Firs	C	
E12	Hamble Point Marina	D	
E23	Leigh Road Offices	D	
E27	Hound Farm	D	
E8	Chalcroft Business Park	D	
E5	Denham's Corner	E	Low
E6	GE Aviation	E	
E21	West Horton Farm Industrial Estate	E	
E24	Allington Lane Industrial Estate	E	
E25	Coach House at Netley Firs Road	E	
E29	Ridge Farm, Grange Road	E	

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

- 1.1.1 Eastleigh provides a number of key industrial and office locations. In particular, Chandlers Ford Industrial Estate, Nelson Industrial Estate, Tollgate Business Park and Botleigh Grange Office Park are key strategic employment locations.
- 1.1.2 Generally, the grade 'A' (High) and 'B' (Above average) sites are modern and many have seen some improvement in recent years.
- 1.1.3 A number of the industrial sites, even those with 'B' (Above average) ratings, have varying proportions of older buildings in need of refurbishment.
- 1.1.4 In future, development planning should allow, where possible, for a range of tenures as the market needs to be able to offer freehold and long leasehold opportunities, in addition to the standard 'institutional style' leasehold premises. However, it is accepted that this is not something that can be entirely controlled through the planning system.
- 1.1.5 From the ranking schedule, it is clear that the rural locations score poorly, but this is because they have failings in several categories. However, they still have a rightful and important place in the market and schemes of this type should potentially be protected to satisfy demand.

1.1.6 Similarly, the marine based sites generally score at a lower than average level, but they have been scored on the same basis as the much larger established business sites, however, they have a strong USP, which is access to water.

2.0 INTRODUCTION

2.1 Purpose of the report

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

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

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

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

2.1.5 This report contains the following:

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

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

2.2 LSH Credentials and methodology

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

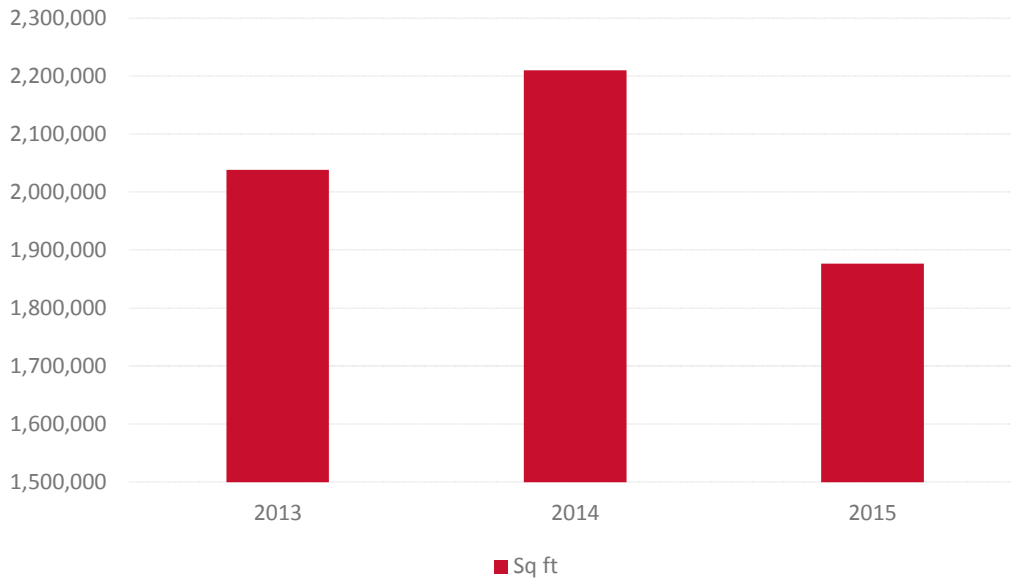


Figure 1 - Total sq ft transacted by LSH's South Coast agency division 2013 to 2015 (Source: LSH)

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

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

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

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

B1(a) Offices other than A2

B1(b) R&D – labs, studios, etc.

B1(c) Light industrial

B2 General industrial

B8 Storage and distribution including warehouse and logistics

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

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

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

3.0 HAMPSHIRE MARKET OVERVIEW

3.1 General

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

3.2 Industrial market overview

- 3.2.1 The South Coast industrial/warehouse market is continuing to enjoy an encouraging level of activity. This is resulting in the South Coast experiencing a shortage of good quality, modern, detached industrial and logistics units in suitable locations, as there has been a negligible amount of speculative development taking place over the last five to ten years as a result of uncertainty in the UK property and financial markets created by the banking crisis.
- 3.2.2 This recent demand has outstripped the supply of both prime and secondary units in the region, providing a positive level of activity which has given developers and institutions the

confidence to consider undertaking speculative development, particularly for units of 30,000 sq ft to 100,000 sq ft.

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

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

3.2.5 Availability

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

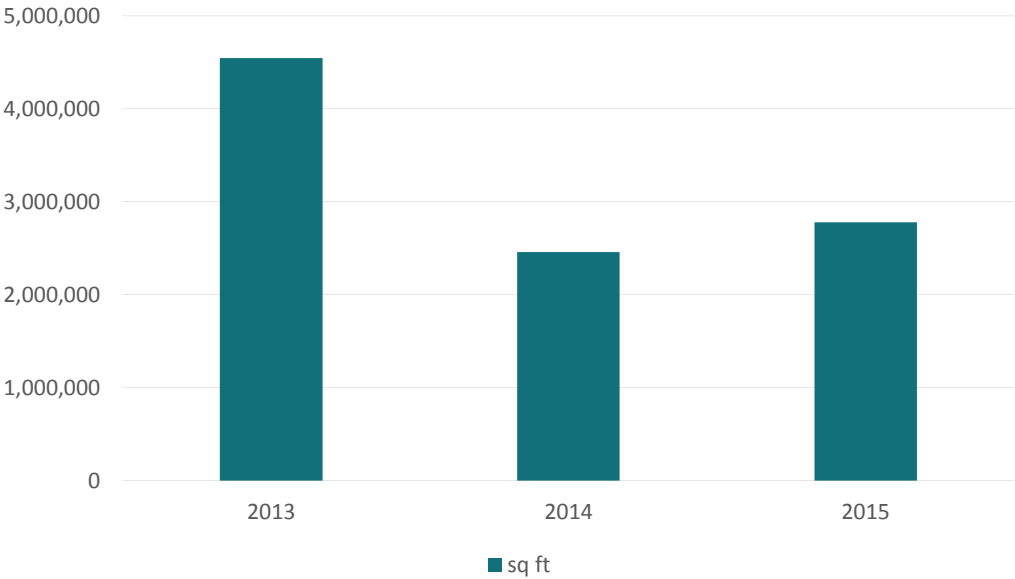


Figure 2 – South Hampshire and Andover industrial availability for the period 2013 to 2015 (Source: LSH and CoStar)

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

3.2.6 Take-up

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

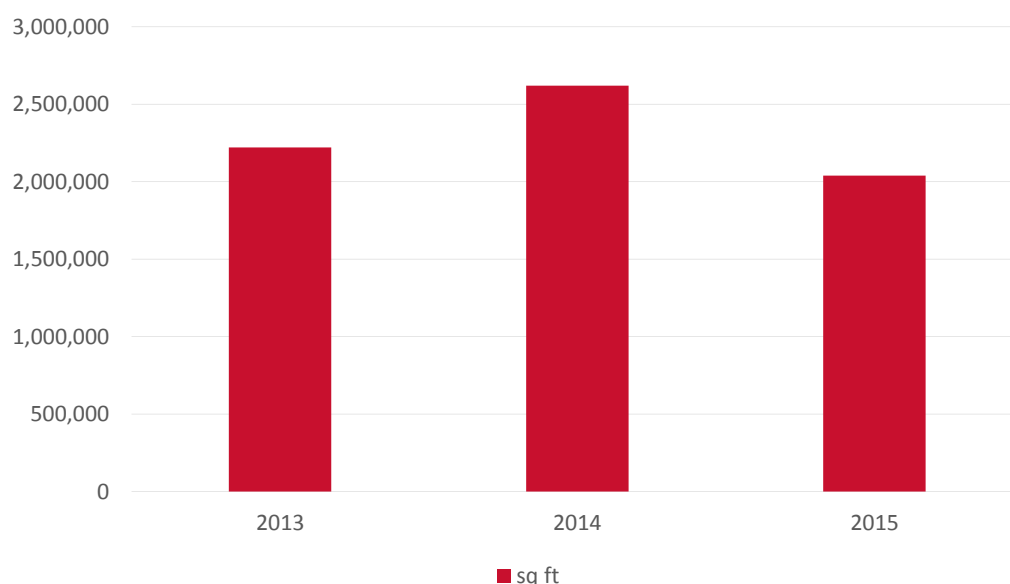


Figure 3 – South Hampshire and Andover industrial take-up for the period 2013 to 2015 (Source: LSH and CoStar)

3.2.7 Rents and capital values

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

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

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

given developers and institutions the confidence to consider acquisitions on the South Coast seriously.

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

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

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

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

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

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

3.2.8 Summary

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

3.3 Office market overview

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

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

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

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

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

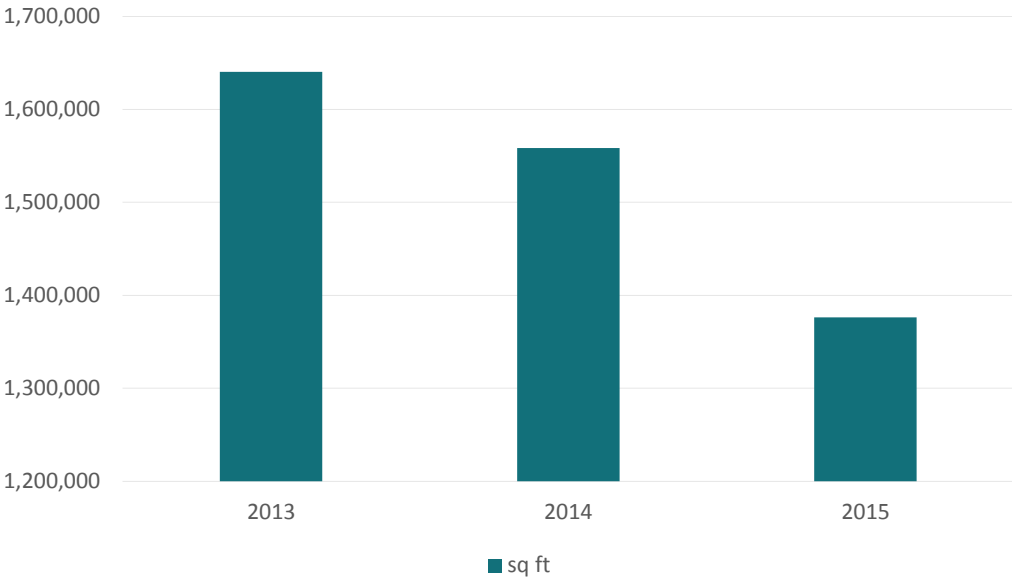


Figure 4 – South Hampshire and Andover office availability for the period 2013 to 2015 (Source: LSH and CoStar)

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

3.3.6 Availability

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

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

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

3.3.7 Take-up

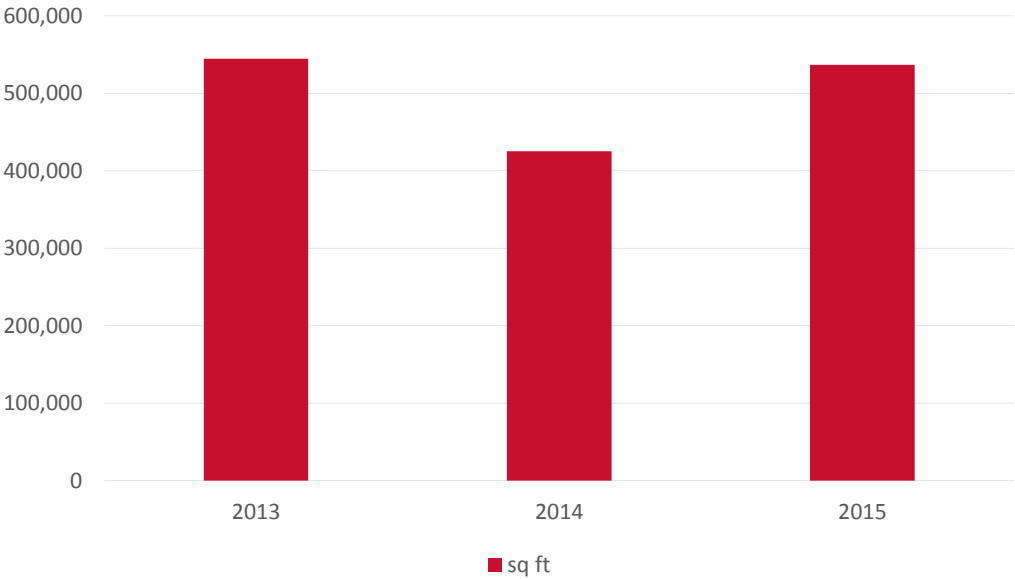


Figure 5 – South Hampshire and Andover office take-up for the period 2013 to 2015 (Source: LSH and CoStar)

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

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

3.3.8 Rents and capital values

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

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

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

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

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

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

3.3.9 Summary

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

3.4 Maritime industry

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

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

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

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

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

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

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

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

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

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

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

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

3.4.9 To reinforce the sector's importance, the Solent is home to some 1,750 marine related businesses, employing over 40,000 personnel and representing the major advanced manufacturing and marine cluster in the UK. Testimony to this status was recently exemplified by the arrival of the BAR America's Cup team base in Portsmouth. To retain and expand this sector's activity, the current and future availability of built stock and employment land is clearly a fundamental pre-requisite and we advocate that the larger, strategic sites such as Tipner West and the Centenary Quay marine quarter, should be protected and promoted.

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

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

- Incubation marine centre of excellence ties up with Further Education and Universities

- City Deal and LEP keen to promote this sector, reference Stevens' report.
- Marine occupiers' characteristics - 'cottage industries', often contract-led thus short commitments, many marine businesses are cost conscious and often land hungry.

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

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

3.4.13 **Summary**

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

3.5 **Rural industry**

3.5.1 In our view, there are some sites within the study area, which do not fit into the established category or description of industrial estates, but still have a role in the hierarchy of available employment accommodation, e.g. rural sites and associated uses and 'unneighbourly/ messy' uses which are appropriately priced.

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

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

3.5.10 Summary

3.5.10.1 The rural industry plays a specialist role within the employment framework of Hampshire. Often the buildings/uses do not fit into a particular category and provide accommodation for small businesses and start-ups. In particular, they offer low-cost accommodation on flexible terms.

4.0 EASTLEIGH BOROUGH OVERVIEW

4.1 Location

4.1.1 The Borough of Eastleigh is in the southern region of Hampshire and is primarily bound by water, including Southampton Water and the River Hamble which borders the east and southwest of the district. It is separated from the New Forest by Southampton Water.



4.1.2 Eastleigh Borough has a population of 116,595 (2011 Census). The age structure has approximately 16.6% of pensionable age and over, compared with the national average of about 16.44%. Of those people who are of working age, statistics taken from the 2011 Census show that Categories 1 (higher managerial, administrative and professional occupations), 2 (lower managerial, administrative and professional occupations) 3 (intermediate occupations) and 4 (small employers and own account workers) make up 60.7% of the workforce. Whilst those in Categories 5 (lower supervisory and technical occupations), 6 (semi-routine occupations), 7 (routine occupations) and 8 (never worked and long-term unemployed) make up 33.4% of the workforce. Full-time students make up 6.0%. These statistics compare with the national average of 53.5%, 37.5% and 9% respectively.

4.1.3 The Borough is well-connected and is served by two motorways – the M27 and M3 - and seven railway stations. It also has an international airport with connections to approximately forty destinations and served 1.78 million passengers in 2015¹. There is also a ferry linking Hamble to Warsash in Fareham. In short, it is an excellent and very popular employment location.

4.2 Industrial take-up and availability

4.2.1 Take-up in the region, over the past three years, has been at around the 450,000 sq ft. Availability within Eastleigh is at approximately twelve months’ supply, which is below the regional average. Whilst the market would appear to be in equilibrium, this would create potential supply issues in the short term property market. We, therefore, need to see new employment-related development coming forward.

¹ [Aircraft and passenger traffic data from UK Airports](#), Civil Aviation Authority

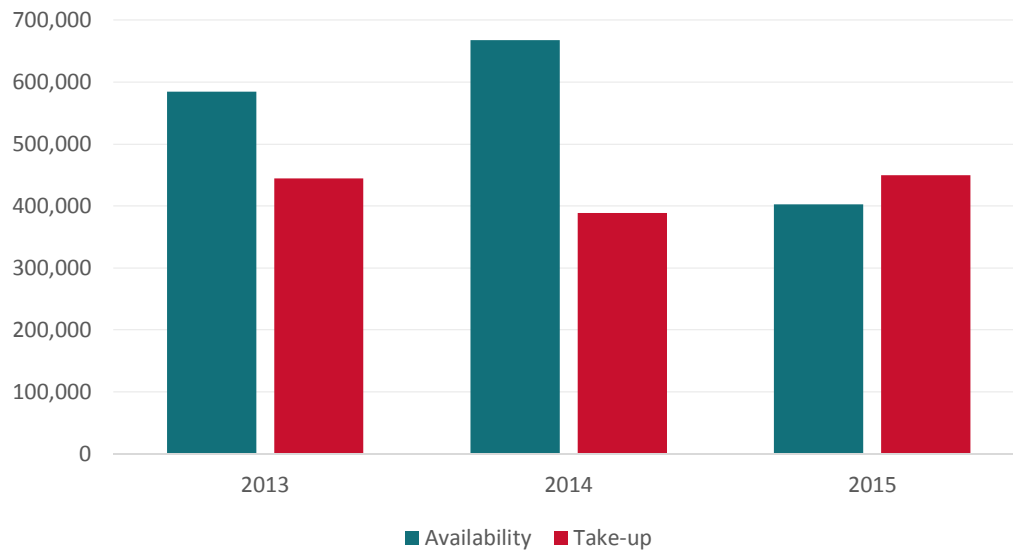


Figure 6 - Three-year industrial availability and take-up statistics for Eastleigh Borough (Source: LSH)

4.3 Key industrial estates within the Borough

- 4.3.1 **Chandlers Ford Industrial Estate, Chandlers Ford** is located immediately to the west of the M3 motorway, between Junctions 12 and 13. Major occupiers include Carlsberg, Vodafone, KDP Tiles, GE Aviation, Kuehne & Nagel and CooperVision. Units on the estate are primarily older stock dating from the 1970s that are generally refurbished as and when they become vacant.
- 4.3.2 **Boyatt Wood Industrial Estate, Eastleigh**, which includes Woodside Road and Parham Drive, is located within one mile of Junction 13 of the M3 and three miles of Junction 5 of the M27 motorways. There are a number of major occupiers in this location including Lambert Brothers Haulage Ltd, Booker Cash & Carry and B&Q. The estates provide a wide range of industrial units dating from the 1960s onwards. There has not been any new employment-related development on these estates for a number of years, although properties are generally refurbished as and when they become vacant.
- 4.3.3 **Barton Park Industrial Estate, Eastleigh** is a short distance to A335, which in turn provides access to Junctions 12 and 13 of the M3, and Junction 5 of the M27 motorways. Overall, access to the motorway is through the town centre and therefore convoluted. The buildings are older stock with greater site coverage than more modern estates.
- 4.3.4 **Nelson Industrial Estate (including Hamilton Business Park), Hedge End** is located within half a mile of Junction 7 of the M27. It is one of the prime industrial estates within the Hedge End area. It is popular with medium to large size business, with occupiers such as GeoPost, Royal Mail, Screwfix, Wickes and Magnet. The estate has been developed in the last 30 years with Hamilton Business Park of more recent vintage.

- 4.3.5 **Waterloo Industrial Park, Royal London Park and Flanders Industrial Park, Hedge End** is located opposite Nelson Industrial Estate and therefore, share the same access to Junction 7 of the M27 motorway. The estate comprises modern refurbished units, popular with a range of occupiers such as DHL, Peter Cooper Volkswagen, Hermes Parcelnet Ltd and RS Components. Buildings are approximately 40 years old.
- 4.3.6 **Ensign Way, Hamble** is approached via Hamble Lane, which is accessed via Junction 8 of the M27 (approximately three miles to the north). Occupiers in this location include Diverse Yachts, Construction Partnership Limited, Kelebek Consulting Ltd and Newoptics Limited. Buildings are modern, having been developed in the last 20 years.
- 4.3.7 Regarding new employment-related development in the Borough, a planning application has been submitted by Bericote Properties for a speculative development of three units totalling 159,000 sq ft at Alpha Park, Chandlers Ford. The B1, B2 and B8 scheme will sit on a site area of 8.5 acres and will be the first major development the estate has seen in over 15 years. A pre-let of 45,000 sq ft has been agreed.

4.4 Key industrial transactions

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

Address	Occupier/Purchaser	Landlord/Vendor	Size (sq ft)	Tenure	Rent (per sq ft)
Unit 1 Royal London Park Hedge End	Hermes Parcelnet Ltd	Royal London Asset Management	59,900	LH	£7.95
Unit 1 Strategic Park Hedge End	Amazon.co.uk	BMO Real Estate Partners	68,431	LH	£7.50 (quoting rent)
Unit F Omega Enterprise Park Chandlers Ford	Asprey Transport	IPIF	26,911	LH	£7.25
Units 5 & 6 Waterloo Industrial Park Hedge End	NATS (En Route) plc	Legal and General	24,568	LH	£7.25
Unit 3 Royal London Park Hedge End	Peter Cooper Motor Group Limited	Royal London Asset Management Limited	23,080	LH	£13.28 (car showroom & workshops)

Table 5 - Key industrial transactions within Eastleigh Borough during 2015

4.5 Office take-up and availability

- 4.5.1 The office parks within the Borough contain some of the larger and better quality offices in the region. As business confidence has improved, in particular with corporate occupiers, we have seen a growth in take-up of grade A buildings. Added to this, a particular shortage of quality buildings within Southampton city centre has led to a number of occupiers relocating to out-

of-town business parks within the Borough, where larger floor plates, quality specification and high parking ratios are prevalent.

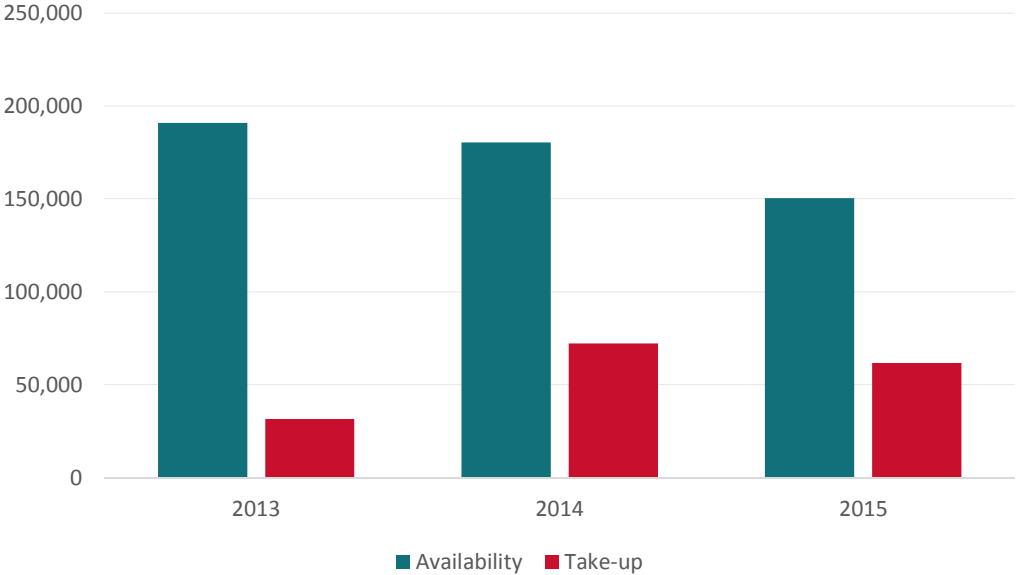


Figure 7 - Three-year office availability and take-up statistics for Eastleigh Borough (Source: LSH)

4.6 Key office locations

4.6.1 **Tollgate Business Park, Chandlers Ford** is a well-established and popular office park situated off Chestnut Avenue, Chandlers Ford. The park provides good access to Junction 13 of the M3 motorway, which is less than one mile to the north, and Junction 5 of the M27, which lies approximately 1.8 miles to the south. The majority of the business park was built in the 1990s and provides office buildings of varying sizes to accommodate small to large business occupiers. On the opposite side of Chestnut Avenue is the Link 414 development, which comprises three high quality office buildings constructed in 1999 and totalling 85,000 sq ft. It has recently been announced that the Household Waste and Recycling Centre is to be relocated to Stoneycroft Rise. This could potentially have an impact on occupancy rates at Link 414 in the future, and we suggest that this is monitored. Major occupiers on the two estates include national companies such as B&Q, ICON Clinical Research (UK) Ltd and Emtor Facilities Services and regional firms such as First Wessex, Blake Morgan, RSM Southampton and Rund Partnership. Our commentary relating to nearby Hampshire Corporate Park can be found in the [Test Valley Borough Overview](#).

4.6.2 **Botleigh Grange Office Park, Hedge End** comprises six self-contained high quality office buildings, built between 1990 and 2009. Whilst the office park lies some 1.5 miles from Junction 8 of the M27 motorway, in a semi-rural location on the outskirts of Hedge End, there is relatively good access via the dual carriageway of Charles Watts Way and the A344. Parking ratios on the site are satisfactory for a development in a location such as this. The

development has an attractive office setting and is occupied by national and regional companies in the legal, professional and financial services sectors such as Trethowans LLP, WYG Limited, Bank of Scotland plc, Halifax Equitable Ltd, Clarke Willmott, Babcock International Group plc.

4.6.3 **Southampton Airport, Eastleigh** – whilst the airport is not a recognised office centre within the Borough, we have included it within this section as it is an important strategic site with future employment-related development potential for this sector. It has excellent road and rail communications, with Southampton Parkway railway station being located within a short walk and Junction 5 of the M27 motorway less than a mile away. National serviced office provider, Regus, occupies a 25,000 sq ft building adjacent to the airport and this is a popular base for many small to medium businesses. In addition, HSBC occupies a 17,650 sq ft building, which was constructed in 2008.

4.7 Key office transactions

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

Address	Occupier	Landlord	Size (sq ft)	Tenure	Rent/Price (per sq ft)
Solvay Premises West End Southampton	Care home operator	Not known	30,691	FH	N/A
Tollbar House Hedge End	Nice Systems UK Limited	Horatio Properties	22,939	LH	£15.00
Unit 8 Berrywood Business Village Hedge End	E-Digital	Private individual	18,906	LH	£15.00
Gateway House Tollgate Chandlers Ford	KPMG	Troika	12,446	LH	£18.25
Jellicoe House Botleigh Grange Office Campus Hedge End	Towergate Underwriting Group	Aberdeen Management Asset	7,746	LH	£16.75
Unit 7 Berrywood Business Village Hedge End	University Hospital Southampton	Private individual	5,664	LH	£15.00
Gateway House Tollgate Chandlers Ford	Konica Minolta	Troika	4,800	LH	£19.00
Ground Floor East Wing Hutwood Court Chandlers Ford	Gleeds	TIAA Henderson Real Estate	4,100	LH	£18.50

Table 6 - Key office transactions within Eastleigh Borough during 2015

4.8 Summary of Eastleigh Borough site reviews

Reference	Site name/address	Grade A-E	Quality	
E11	Nelson Industrial Park	A	High	
E14	Southampton Airport Business Park	A		
E18	Waterloo Industrial Park	A		
E22	Royal London Park	A		
E26	Flanders Industrial Park	A		
E1	Chandlers Ford Industrial Estate	B	Above average	
E2	Northern Business Park	B		
E3	Woodside Avenue Industrial Estate	B		
E9	Tollgate Business Park	B		
E13	Boyatt Wood/Parham Drive Industrial Estate	B		
E15	Botleigh Grange Office Campus	B		
E16	Land at Ageas Bowl	B		
E28	Stoneham Place	B		
E31	Southampton Road Offices	B		
E4	Railway Works	C		Average
E7	Barton Park Industrial Estate	C		
E10	Ensign Way	C		
E17	Port Hamble Marina	C		
E20	Solent Industrial Estate	C		
E30	Deacons Boat Yard	C		
E19	Netley Firs	C		
E12	Hamble Point Marina	D	Below average	
E23	Leigh Road Offices	D		
E27	Hound Farm	D		
E8	Chalcroft Business Park	D		
E5	Denham's Corner	E	Low	
E6	GE Aviation	E		
E21	West Horton Farm Industrial Estate	E		
E24	Allington Lane Industrial Estate	E		
E25	Coach House at Netley Firs Road	E		
E29	Ridge Farm, Grange Road	E		

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

- 4.8.1 Eastleigh provides a number of key industrial and office locations. In particular, Chandlers Ford Industrial Estate, Nelson Industrial Estate, Tollgate Business Park and Botleigh Grange Office Park are key strategic employment locations.
- 4.8.2 Generally, the grade 'A' (High) and 'B' (Above average) sites are modern and many have seen some improvement in recent years. The suitability for purpose and quality of the buildings and the sites, are of primary importance and the key drivers of location, communications, amenities and specification, are high on the list of desirability criteria.
- 4.8.3 Given the above, the most popular industrial estates are in Hedge End, Boyatt Wood and Chandlers Ford, and this is expected to continue.
- 4.8.4 A number of the industrial sites, even those with 'B' (Above average) ratings, have varying proportions of older buildings in need of refurbishment, which sometimes suffer from a higher level of site coverage than is suitable for current occupational requirements, especially for units in excess of 15,000 sq ft, where there is a desire to have secure yard space for the exclusive use of the occupier.
- 4.8.5 Whilst there has been a trend for out-of-town business park style developments, there is a feeling that more office developments will, in the future, take advantage of public transport hubs in city centres or be adjacent to parkway-style railway stations, in particular, to attract more staff.
- 4.8.6 In future, development planning should allow, where possible, for a range of tenures as the market needs to be able to offer freehold and long leasehold opportunities, in addition to the standard 'institutional style' leasehold premises. This is particularly true in relation to owner-managed businesses (freehold or long leasehold) and start-ups (short-term flexible tenure).
- 4.8.7 From the ranking schedule, it is clear that the rural locations score poorly, but this is because they have failings in several categories. However, they still have a rightful and important place in the market, and schemes of this type should potentially be protected to satisfy demand.
- 4.8.8 Similarly, the marine-based sites generally score at a lower than average level, but they have been scored on the same basis as the much larger established business sites, however, they have a strong USP, which is access to water. The necessary and more demanding set of approvals that are required, due to the very strong regulatory controls around the Solent and River Hamble areas, relating to conservation, ecology and environment should not be underrated, because securing allocations for other sites on the waterside will be more difficult to achieve in the future.

5.0 GLOSSARY OF TERMS

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



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

APPENDIX 1

Site Scores and Assessment Criteria

Reference	Site name/address	Strategic Location	Layout/Prominence	Area Character	Local Amenities	Planning Status	Occupier Perception	Age/Suitability	Redevelopment Prospects	Total score	Grade A-E
		1	2	3	4	5	6	7	8		
Eastleigh											
E11	Nelson Industrial Park	5.0	5.0	4.5	4.5	5.0	4.5	4.0	4.5	37.0	A
E14	Southampton Airport Business Park	5.0	4.0	5.0	5.0	5.0	5.0	4.0	5.0	38.0	A
E18	Waterloo Industrial Park	5.0	5.0	5.0	4.5	5.0	4.5	4.0	3.5	36.5	A
E22	Royal London Park	5.0	4.5	5.0	4.5	5.0	5.0	4.0	5.0	38.0	A
E26	Flanders Industrial Park	5.0	5.0	5.0	4.5	5.0	4.5	4.0	4.5	37.5	A
E1	Chandlers Ford Industrial Estate	4.0	3.5	4.0	3.5	5.0	4.5	3.5	3.5	31.5	B
E2	Northern Business Park	5.0	4.0	4.0	4.0	4.0	3.0	4.0	2.0	30.0	B
E3	Woodside Avenue Industrial Estate	5.0	4.5	4.5	4.0	5.0	5.0	3.0	3.0	34.0	B
E9	Tollgate Business Park	4.0	4.0	4.0	3.5	5.0	4.0	4.0	5.0	33.5	B
E13	Boyatt Wood/Parham Drive Industrial Estate	5.0	4.5	4.0	4.5	5.0	5.0	3.0	3.0	34.0	B
E15	Botleigh Grange Office Campus	4.0	4.0	5.0	3.5	5.0	4.0	4.0	4.0	33.5	B
E16	Land at Ageas Bowl	4.0	3.5	4.0	4.0	4.0	4.0	5.0	2.0	30.5	B
E28	Stoneham Place	5.0	3.0	3.0	4.0	5.0	4.0	4.0	5.0	33.0	B
E31	Southampton Road Offices	5.0	5.0	4.0	5.0	5.0	2.0	3.0	2.0	31.0	B
E4	Railway Works	5.0	4.0	4.0	4.0	4.0	3.0	3.0	2.0	29.0	C
E7	Barton Park Industrial Estate	3.0	3.0	4.0	4.0	4.0	3.0	2.5	2.0	25.5	C
E10	Ensign Way	2.5	3.5	3.0	2.5	5.0	3.0	3.5	4.0	27.0	C
E17	Port Hamble Marina	2.0	2.5	3.0	2.5	4.5	4.0	3.0	3.5	25.0	C
E20	Solent Industrial Estate	4.0	3.5	3.5	4.0	5.0	3.0	2.5	2.5	28.0	C
E30	Deacons Boat Yard	3.0	3.0	3.0	2.0	5.0	4.0	3.0	4.0	27.0	C
E19	Netley Firs	4.5	4.0	1.5	3.0	3.5	3.0	3.5	2.0	25.0	C
E12	Hamble Point Marina	2.0	2.5	3.0	2.0	4.5	4.0	3.0	3.5	24.5	D
E23	Leigh Road Offices	4.0	4.0	2.0	5.0	3.0	3.0	1.0	2.0	24.0	D
E27	Hound Farm	3.0	3.0	2.0	3.0	1.0	2.0	3.0	3.0	20.0	D
E8	Chalcroft Business Park	2.0	2.5	2.5	1.5	3.5	3.0	3.0	2.0	20.0	D
E5	Denham's Corner	2.5	2.0	2.0	1.5	1.0	2.0	1.5	3.5	16.0	E
E6	GE Aviation	2.5	2.5	2.0	2.5	3.0	2.0	2.0	2.0	18.5	E
E21	West Horton Farm Industrial Estate	2.0	1.0	1.0	1.0	2.0	2.0	2.0	2.0	13.0	E
E24	Allington Lane Industrial Estate	2.0	2.0	3.0	1.0	1.0	2.0	1.0	4.0	16.0	E
E25	Coach House at Netley Firs Road	1.0	1.0	1.0	2.0	1.0	1.0	3.0	4.0	14.0	E
E29	Ridge Farm, Grange Road	1.0	1.0	1.0	1.0	1.0	1.0	1.0	5.0	12.0	E

EMPLOYMENT LAND STUDY

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

1. Strategic location/accessibility

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

2. Estate layout/prominence

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

3. Character of area/neighbouring uses

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

4. Local amenities/public transport

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

5. Planning status

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

6. Occupier perception/property values

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

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

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

8. Re-development prospects and constraints

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

Scoring – overall classification

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

APPENDIX 2
Eastleigh Borough Site Proformas

Site Name: Chandler's Ford Industrial Estate			
Site Ref:	E1		
Borough:	Eastleigh	Size (ha)	46.5
Description of Site and Location:	Chandlers Ford Industrial Estate is one of the key industrial/distribution locations in the Southampton area. The park is located immediately to the west of J12/J13 of the M3 connecting to the M27 south and the M25 to the north. Southampton airport is within 3.4 miles and Southampton Docks is within 6.8 miles.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	Yes	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes, but unlikely to come forward for comprehensive redevelopment.	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	Not applicable	
Market Appraisal	<p>Chandlers Ford Industrial Estate is a popular estate on the periphery of Eastleigh. It comprises a mix of B1, B2 and B8 properties, which range in size and age, from small start-up units to much larger ones. Older properties are generally refurbished and upgraded as they become vacant.</p> <p>Whilst there has not been any significant new development in the last 20 years, Bericote Properties is awaiting planning approval for 160,000 sqft (14,864 sq m) at Alpha Park for a new B1, B2 and B8 scheme to commence in Q1 2016.</p>		
Adjacent land use and conflicts	Some complaints from residential occupiers on the estate's periphery to 24 hour working.		
Known constraints and infrastructure requirements	None, so far as aware.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	Allocated as Existing Employment Land under policy DM12	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No specific user or specialist use	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No – long established employment use. Highly unlikely to come forward for comprehensive redevelopment, other than for individual units/sites within the overall employment area.	

<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>N/A</p>
<p>Strategic Planning and Access</p>	<p>Strategically located on junction 13 of the M3 and less than 10 miles from the A34, Chandlers Ford, on the outskirts of Southampton, provides excellent road access to all parts of the country.</p>
<p>Recommendation</p>	<p>Site score: B – above average</p> <p>The site provides excellent employment accommodation in a highly accessible area. It should be protected for continuing employment use.</p>

Site Name: Northern Business Park			
Site Ref:	E2		
Borough:	Eastleigh	Size (ha)	21.7
Description of Site and Location:	Undeveloped greenfield site at Southampton Airport.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	No	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	No	
1.7:	Is the site immediately available?	No	
Market Appraisal	Generally, in an excellent strategic location suitable for mixed commercial development including employment related uses, subject to resolving any associated issues such as infrastructure and accessibility.		
Adjacent land use and conflicts	Surrounding land includes Southampton Airport, railway lines, allotments, the River Itchen and the Itchen Navigation. It is also located with the 'airport safety zone'.		
Known constraints and infrastructure requirements	A new link road is required to be built to bring the entire site forward for redevelopment. Without this provision perhaps only part of the site could be redeveloped for employment use. A link with the airport will be important.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	Site is allocated in the Local Plan for employment development.	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	Due to the proximity of the airport, part of the site would be suitable for airport related employment uses.	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	The site comprises a large strategic employment allocation in the Local Plan.	

<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>Present funding for new road link unclear. Likely to require a mixture of private and public investment.</p>
<p>Strategic Planning and Access</p>	<p>The site is integral to the wider PUSH strategy to promote economic development.</p>
<p>Recommendation</p>	<p>Site score: B – above average</p> <p>This is a potentially important site for employment use, close to Eastleigh, Southampton Airport, Southampton Parkway railway station and the M27, and subject to dealing with the constraints mentioned above, could be of interest to high value uses including offices, R&D space or hotel</p>

Site Name: Woodside Avenue Industrial Estate			
Site Ref:	E3		
Borough:	Eastleigh	Size (ha)	20.2
Description of Site and Location:	Woodside Avenue Industrial Estate is an established urban industrial estate in Eastleigh, located close to J13 of the M3.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Multi-ownership		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes, but unlikely to come forward for comprehensive redevelopment		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	No		
1.7: Is the site immediately available?	Not applicable		
Market Appraisal	<p>Woodside Avenue Industrial Estate is a popular estate on the periphery of Eastleigh. It comprises a mix of B1, B2 and B8 properties, which range in size and age, from small start-up units to much larger ones. Older properties are generally refurbished and upgraded as they become vacant.</p> <p>There has been no significant new development in recent years.</p>		
Adjacent land use and conflicts	The site is adjacent to the M3 motorway, no conflicts as far as we are aware.		
Known constraints and infrastructure requirements	None.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?	Identified as an Existing Employment Area and protected for ongoing B1-B8 uses.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A		

Strategic Planning and Access	Strategically well located just off of junction 13 of the M3. Provides a significant proportion of the borough's B Class employment floor space.
Recommendation	Site score: B – above average The site provides excellent employment accommodation in a highly accessible area. It should be protected for continuing employment use.

Site Name: Railway Works			
Site Ref:	E4		
Borough:	Eastleigh	Size (ha)	19.0
Description of Site and Location:	The Railway Works is an urban industrial site in central Eastleigh, located on Campbell Road and accessed from Southampton Road (A335). J13 off the M3 and J5 off the M27 are within one mile of the site. The site offers a range of industrial warehousing and open storage accommodation.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	Yes		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No, subject to comments below		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	See comments below		
1.7: Is the site immediately available?	No, subject to comments below		
Market Appraisal	Former Alstom Railway Works site, owned by St Modwen and has been marketed by CBRE since the railway works closed some years ago for B1, B2 and B8 uses. We understand the site is now in full use and occupied by numerous tenants on short term leases and licences, pending some future potential re-development.		
Adjacent land use and conflicts	Residential and railway lines. Narrow single access bridge to the site, over the railway line.		
Known constraints and infrastructure requirements	Part of the site is constrained by the defined "airport safety zone", which prohibits development, along with limited vehicular access, and by extensive rail infrastructure and the sensitivity of the Itchen valley to the east. In addition, a new link road from Bishopstoke Road to Wide Lane, via Chickenhall Lane is required to fully unlock the site's regeneration potential.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?	Site is allocated for future employment use in the Local Plan.		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No, site is identified for a mix of employment uses.		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	Yes, the entire site is identified for regeneration.		
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No funds have been allocated		

Strategic Planning and Access	
Recommendation	Site score: C –average The site plays an important part in providing low-cost, short term employment land and buildings, many of which are at, or close to, their useful end of life. With improved access this would be a valuable employment site.

Site Name: Denham's Corner			
Site Ref:	E5		
Borough:	Eastleigh	Size (ha)	18.9
Description of Site and Location:	<p>The site is an undeveloped greenfield plot in Horton Heath. The site is located 6 mins north of J7 on M27. The M27 provides good road communications along the Solent Corridor, linking into the M3/A3(M) motorway network to the M25 and London. Southampton International Airport is approximately 4 miles to the west and adjoins Southampton Parkway Railway Station providing a regular service to London (Waterloo approx. 70 mins).</p>		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Not known	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	No	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Not known	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Not known	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Potentially	
1.7:	Is the site immediately available?	Not known	
Market Appraisal	<p>The site is located off a the B3342, approximately 3 miles from junction 7, M27 motorway. The site is in a rural location with, we understand, substantial residential development proposed in the surrounding area.</p>		
Adjacent land use and conflicts	Agricultural and residential		
Known constraints and infrastructure requirements	None		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Adjacent junction at Snakemoor Lane identified for upgrading	
Strategic Planning and Access	<p>Site lies within an identified "Countryside Gap" under Policy C9. As a result, in countryside gaps as defined on the policies map, development which physically or visually diminishes the gap, or has an urbanising effect detrimental to the openness of the gap, the character of the countryside or the separate identity of the adjoining settlements will not be permitted.</p>		

Recommendation	Site score: E – low Potential small scale commercial scheme/centre as part of a mixed use development.
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Site Name: GE Aviation			
Site Ref:	E6		
Borough:	Eastleigh	Size (ha)	17.2
Description of Site and Location:	GE Aviation is an urban fringe single occupant industrial site in Hamble. The site is situated on Kings Avenue off the B3397 (Hamble Lane) south of Hamble. The site is occupied by a single tenant.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	Site is situated off the B3397 and has been in the ownership and use of GE Aviation for a significant amount of time. The site has potential for mixed-use development including employment uses, as well as residential, leisure and recreation.		
Adjacent land use and conflicts	Residential to one side, Country Park to the other and alongside Southampton Water.		
Known constraints and infrastructure requirements	Both existing access roads are through a densely populated residential area.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Allocated as Existing Employment Land under policy DM12		

Recommendation	Site score: E – low Site is the long-time home of current occupier and has a future while this use continues with this important long established local employer. Monitor current use as a replacement use in the current buildings is highly unlikely. Future uses sensitive to local transport infrastructure, although it is reasonably well located for access to J8 M27. Mixed use may provide sustainability benefits.
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Site Name: Barton Park Industrial Estate			
Site Ref:	E7		
Borough:	Eastleigh	Size (ha)	16.2
Description of Site and Location:	Barton Park Industrial Estate is a well established industrial location off Chickenhall Lane which is accessed off Bishopstoke Road (B3037) leading to A335 providing access to J12 and 13 of the M3 and J5 of the M27. The site offers a range of industrial/warehouse accommodation.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	Yes	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	No	
Market Appraisal	The site is within a well-established industrial location to the east of Eastleigh town centre, currently accessed via the town centre and over a railway bridge. The site is suitable for a partial or whole redevelopment for employment related and potentially higher-value uses on part, such as retail.		
Adjacent land use and conflicts	The whole site adjoins part industrial, railway, residential and the River Itchen Valley.		
Known constraints and infrastructure requirements	The site is constrained by limited vehicular access, and by extensive rail infrastructure and the sensitivity of the Itchen valley to the east. In addition, an improved access to the motorway network is required to fully unlock the site's regeneration potential.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	Yes	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	Yes	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No	

<p>Strategic Planning and Access</p>	<p>Site forms part of the wider Eastleigh Riverside development area, an area of Strategic importance. The site is specifically allocated for:</p> <ul style="list-style-type: none"> • A Technology and Innovation Centre and associated facilities; • uses complementary to Eastleigh town centre such as offices (use class B1(a) business uses); bulky goods retail; hotel/conference centre, restaurants and other leisure uses; some residential development and related community uses possibly including student accommodation; and • car parking to serve Eastleigh Station and the town centre; • other employment uses in use classes B1, B2 or B8; • a new access from Bishopstoke Road, or an improved access from Chickenhall Lane.
<p>Recommendation</p>	<p>Site score: C – average</p> <p>Provides a good proportion of the industrial floor space close to Eastleigh Town Centre but many of the buildings are coming towards the end of their economic life and the site coverage and layout of the estate falls somewhat short of modern standards and requirements.</p> <p>The site could be under pressure from higher value alternative uses, such as out-of-town retail and trade counter uses.</p>

Site Name: Chalcroft Business Park			
Site Ref:	E8		
Borough:	Eastleigh	Size (ha)	14.2
Description of Site and Location:	<p>The site is a Countryside Industrial Estate in Horton Heath. The Park extends to approx. 250,000 sq ft and provides a range of units with 24 hr security.</p> <p>The estate is located 6 mins north of J7 on M27. The M27 provides good road communications along the Solent Corridor, linking into the M3/A3(M) motorway network to the M25 and London. Southampton International Airport is approximately 4 miles to the west and adjoins Southampton Parkway Railway Station providing a regular service to London (Waterloo approx. 70 mins).</p>		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	Yes	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	No	
1.7:	Is the site immediately available?	No	
Market Appraisal	The site is situated within a rural location, with limited B road access that requires investment to improve. The site is suitable for employment related uses in a semi-rural area.		
Adjacent land use and conflicts	Residential (and future residential development with consent), agricultural and railway line.		
Known constraints and infrastructure requirements	Road network accessibility.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	Site is identified for potential employment lead redevelopment in Policy WE6 of the emerging plan. The new link road is being provided as part of the residential consent adjacent.	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	

<p>2.3: Is the site part of a comprehensive or long term development or regeneration proposal?</p>	<p>No</p>
<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>No evidence of public funding for the new road.</p>
<p>Strategic Planning and Access</p>	<p>The site suffers from being located in a very rural location, meaning that the surrounding roads are unsuited to the number of commercial trips generated.</p> <p>However, the site is reasonably well let and provides a solid function in wider employment land provision in the area.</p>
<p>Recommendation</p>	<p>Site score: D – below average</p> <p>To retain in its current use, but any enhancement of its potential will rely upon transport infrastructure improvements, which includes a link road as part of a development scheme.</p>

Site Name: Tollgate Business Park			
Site Ref:	E9		
Borough:	Eastleigh	Size (ha)	12.1
Description of Site and Location:	Tollgate Business Park is an established out of town office park in Eastleigh. It is located approximately 6 miles north of Southampton City Centre with good access to J5 of the M27 and J13 of M3.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	The site as a whole has undergone some relatively recent development in the last 20 years and includes office development and B&Q headquarters on part. It is a prime office location, heavily reliant on parking. Whilst it is reasonably close to rail infrastructure, shuttle bus services are still required.		
Adjacent land use and conflicts	Adjoins retail and M3 motorway.		
Known constraints and infrastructure requirements	There is congestion at peak times in this area, which is a concern to occupiers.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?			Site is allocated as existing employment land under Policy DM12
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Its location at the confluence of the M3/M27 is in theory excellent. At the majority of the time this is the case, however, owing to its relative distance away from motorway junctions, congestion is an issue at peak times. In principal its proximity to Airport Parkway provides good public transport facilities, however, this is not sufficiently close to allow connections on foot and therefore, additional links either via taxi or bus are still required to connect the area to this public transport node. This is highlighted as a concern by some occupiers.		

Recommendation	Site score: B – above average The site provides excellent employment accommodation in a location that has good connectivity, both rail and road, but with congestion issues, particularly at peak times. Recent junction improvements at Junction 5 of the M27 motorway may have improved the situation. However, it is a sought after location and should be protected for continuing employment use.
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Site Name: Ensign Way			
Site Ref:	E10		
Borough:	Eastleigh	Size (ha)	10.6
Description of Site and Location:	Ensign Way is a well established urban business park in Hamble-le-Rice providing a range of business units.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Multi-ownership
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	The site has undergone relatively recent development in the last 20 years as a business unit estate and industrial use with CooperVision being a major occupier and a number of local and national occupiers in the business development.		
Adjacent land use and conflicts	Residential, refinery and Southampton Water.		
Known constraints and infrastructure requirements	Traffic congestion along Hamble Lane.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Site is allocated as existing employment land under Policy DM12		

Recommendation	Site score: C – average A popular employment site with a good mix of local, regional and national companies. It should be protected for its current employment use.
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Site Name: Nelson Industrial Park			
Site Ref:	E11		
Borough:	Eastleigh	Size (ha)	9.0
Description of Site and Location:	Nelson Industrial Park is situated in an established industrial and trade location in Hedge End. The site is located within one mile of J7 of the M27. The estate is approached off Botley Road (B3035) through Hamilton Business Park.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			Yes
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	The site is owned by Hargreaves Developments and has been developed in the last 15 years as the Hamilton Business Park for trade counter, showroom, industrial and warehouse use. There is a final undeveloped site available, suitable for up to 30,000 sq ft of industrial/warehouse use.		
Adjacent land use and conflicts	B1, B2 and B8 uses.		
Known constraints and infrastructure requirements	None.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Site is allocated as existing employment land under Policy DM12.		

Recommendation	Site score: A – high This site is an established and popular industrial employment location, which should continue in this use for the foreseeable future. The estate benefits from excellent road connections, roadside prominence and suitable layout for its use.
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Site Name: Hamble Point Marina			
Site Ref:	E12		
Borough:	Eastleigh	Size (ha)	8.3
Description of Site and Location:	Hamble Point Marina is a boat yard at the mouth of the river Hamble. It is a 230 – berth marina with a range of shore-side facilities.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	Yes	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	No	
Market Appraisal	<p>The site has limited access via a long cul-de-sac to the mouth of the River Hamble, hence its popularity with leisure boat owners and operators</p> <p>The former boatbuilding shed has been divided into smaller units housing marine related businesses and other buildings are used for marine related employment uses, including an element of retail/trade counter plus A3, all of which is enhanced by the availability of water access, mooring pontoons and open storage for boats.</p> <p>The whole atmosphere of the marina/boatyard creates a premium value which is difficult for other employment uses to compete with.</p>		
Adjacent land use and conflicts	Marine related uses and nature conservation.		
Known constraints and infrastructure requirements	Road access and nature conservation.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	Yes – marine related activity	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No	

Strategic Planning and Access	Site is protected for continued marina and port use under policy DM18.
Recommendation	Site score: D – below average As with other marine related sites it provides a valuable and important function, supporting local marine and leisure uses. It should therefore be protected for these occupier types and associated businesses. Due to its function it is not comparable with other more traditional industrial sites within the study areas.

Yes Site Name: Boyatt Wood/Parnham Drive Industrial Estate			
Site Ref:	E13		
Borough:	Eastleigh	Size (ha)	8.4
Description of Site and Location:	Parnham Drive Industrial Estate is an established industrial location within Boyatt Wood Industrial Estate in Eastleigh. It is within one mile of J13 of the M3 and is in close proximity to the M27. It offers a range of industrial / warehouse units.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Yes	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Yes, but unlikely to come forward for comprehensive redevelopment.	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		No	
1.1: Has the site been formally identified for employment for at least 10 years?		No applicable	
Market Appraisal	As with Woodside Avenue Industrial Estate, this is a popular estate on the periphery of Eastleigh. It comprises a mix of B1, B2 and B8 properties, which range in size and age, from small start-up units to much larger ones. Older properties are generally refurbished and upgraded as they become vacant. There has been no significant new development in recent years.		
Adjacent land use and conflicts	The site is adjacent to the M3 motorway, no conflicts as far as we are aware.		
Known constraints and infrastructure requirements	None.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?		No	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?		N/A	
Strategic Planning and Access	Strategically well located just off of junction 13 of the M3. Provides a significant proportion of the borough's B Class employment floor space. Allocated as Existing Employment Land under policy DM12		

Recommendation	<p>The site provides excellent employment accommodation in a highly accessible area. It should be protected for continuing employment use.</p> <p>Site score: B – above average</p>
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Site Name: Southampton Airport Business Park			
Site Ref:	E14		
Borough:	Eastleigh	Size (ha)	7.5
Description of Site and Location:	Southampton Airport Business Park is an urban fringe business park at Southampton Airport, located at J5 of the M27.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.1: Has the site been formally identified for employment for at least 10 years?			No
Market Appraisal	<p>This site adjoins Southampton International Airport and has undergone relatively recent development, including car showroom, offices and distribution.</p> <p>It has the potential to become a high-class office location with superb connectivity via road, rail and air.</p>		
Adjacent land use and conflicts	Airport and M27 motorway.		
Known constraints and infrastructure requirements	Road infrastructure would need enhancing to make the most out of this site. Rail and air connections are excellent.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Site is allocated as existing employment land under Policy DM12		

Recommendation	Site score: A – high At present there are no vacant development opportunities on this site. In our opinion, this is an excellent employment site, which should be protected. Given its excellent proximity to the M27 motorway, Southampton Airport Parkway railway station and the airport it could therefore, come under pressure from higher value uses such as office and hotel, which would be suitable for this location.
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Site Name: Botleigh Grange Office Campus			
Site Ref:	E15		
Borough:	Eastleigh	Size (ha)	6.0
Description of Site and Location:	Botleigh Grange Office Campus is an out of centre office campus in Hedge End. The site is accessed directly off Grange Road (A344). The business part comprises of 6 self contained office buildings and hotel and spa.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	Yes	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	No	
Market Appraisal	<p>The site comprises Botley Grange Office Campus and an un-developed site, part of which we understand has been identified by a care home operator.</p> <p>It is a popular office location accommodating a number of office 'pavilions' some in single occupation but most multi-occupied.</p> <p>We consider this location is suitable for future office development.</p>		
Adjacent land use and conflicts	Residential and agricultural		
Known constraints and infrastructure requirements	Limitations to public transport infrastructure, being one mile away from Hedge End train station and congestion at peak times.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	Allocated as an Existing Employment Site where B1, B2 and B8 uses are protected.	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A	

Strategic Planning and Access	Site has good access off the A334 and is a short drive from Junction 7 of the M27.
Recommendation	Site score: B – above average Well regarded office location in a mature landscaped setting. Current high occupancy rates and should be retained for employment uses.

Site Name: Land at the Ageas Bowl			
Site Ref:	E16		
Borough:	Eastleigh	Size (ha)	5.4
Description of Site and Location:	The Land at Ageas Bowl is an undeveloped greenfield/overflow carpark in the West End. The site is located approximately 1.2 miles from J7 of the M27.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Not known	
1.2:	Has there been any recent development activity, within the last 5 years?	On the adjoining land	
1.3:	Is the site being actively marketed as an employment site?	Not known	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Not known	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Not known	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	Not known	
Market Appraisal	The site adjoins Hampshire County Cricket Ground, Hilton Hotel, Holiday Inn Express and Hampshire Tennis Club. The site has potential for a variety of uses, subject to planning.		
Adjacent land use and conflicts	Leisure use.		
Known constraints and infrastructure requirements	Unknown.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	Yes	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A	
Strategic Planning and Access	Site allocated for commercial purposes in use classes B1(b) and B1(c) or similar uses. This could include facilities for business, research and development, educational services or medical services		

Recommendation	Site score: B – above average Opportunity for a B1(a) development on this site, taking advantage of the unique location next to the Ageas Bowl, subject to improvements to the road infrastructure.
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Site Name: Port Hamble Marina			
Site Ref:	E17		
Borough:	Eastleigh	Size (ha)	4.4
Description of Site and Location:	Port Hamble Marina is a boat yard in Hamble-le-Rice located on the river Hamble, it is a 310 berth marina offering a range of services and conveniently located a short distance from Hamble village.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	No	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Not known	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Not known	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Potentially	
1.7:	Is the site immediately available?	No	
Market Appraisal	This waterfront site has limited road accessibility through Hamble Village Centre and its location is likely to limit future development to marine related industry or residential purposes, subject to planning.		
Adjacent land use and conflicts	Residential to the west and the River Hamble marina to the east.		
Known constraints and infrastructure requirements	None.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	Yes – marine related activity	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A	
Strategic Planning and Access	Site is protected for continued marina and port use under policy DM18.		

Recommendation	Site score: C – average As with other marine related sites it provides a valuable and important function, supporting local marine and leisure uses. It should therefore be protected for these occupier types and associated businesses. Due to its function it is not comparable with other more traditional industrial sites within the study areas.
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Site Name: Waterloo Industrial Park			
Site Ref:	E18		
Borough:	Eastleigh	Size (ha)	4.3
Description of Site and Location:	Waterloo Industrial Park is an urban industrial/storage and distribution site in Hedge End, situated off Flanders Road linking to Botley Road providing access to the A334 and J7 of the M27.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	No	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	No	
Market Appraisal	<p>The site comprises two terraces of industrial/warehouse units owned by BMW Trustees and asset managed by Legal & General and a larger distribution warehouse owned by Threadneedle and let to Import Services.</p> <p>The site has excellent accessibility to J7, M27 within 1 mile and is suitable for a variety of future employment related uses including retail, showroom, industrial & distribution.</p>		
Adjacent land use and conflicts	Retail, Industrial & offices		
Known constraints and infrastructure requirements			
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A	
Strategic Planning and Access	Site is allocated as existing employment land under Policy DM12.		

Recommendation	Site score: A – high <p>This site is an established and popular industrial employment location, which should continue in this use for the foreseeable future. However, should the opportunity arise, there is potential for other higher value uses, such as retail or trade park occupiers, due to its visibility from the road, proximity to the M27 and existing out-of-town retail.</p>
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Site Name: Netley Firs			
Site Ref:	E19		
Borough:	Eastleigh	Size (ha)	4.1
Description of Site and Location:	Countryside site located adjacent to the M27 3 mins south of J7. Majortek Components Limited is a current tenant on the site.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	No	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	No	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Not known	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Not known	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	No	
Market Appraisal	The site has potential for employment related use such as industrial and offices. It is in a semi rural location, albeit part of the site adjoins the M27 and is close to Junctions 7 and 8 of the M27.		
Adjacent land use and conflicts	Residential and agricultural land.		
Known constraints and infrastructure requirements			
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	N/A	
Strategic Planning and Access	Allocated for B1b, B1c or B2 development		

Recommendation	Site score: C – average This rural site is surrounded by a few residential dwellings, however there could be some potential for future development although, due to its location, we foresee any development being restricted to B1(c) light industrial.
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Site Name: Solent Industrial Estate			
Site Ref:	E20		
Borough:	Eastleigh	Size (ha)	3.8
Description of Site and Location:	Solent Industrial Estate is an established urban industrial/office park in Hedge End, situated off Shamblehurst Lane in Hedge End within close proximity to J7 of the M27. The surrounding area is characterised by a mixture of industrial, trade counter and retail warehouse occupiers.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			Yes
1.4: Is the site owned by a developer or another agency known to undertake employment development?			No
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			Yes
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No
Market Appraisal	Solent Industrial Estate was built in the 1960's and units were sold by Industrial Ownership to a mix of owner occupiers and intuitions. It adjoins newer industrial and trade counter units on Hamilton Business Park and residential off Shamblehurst Lane. The site has potential for future employment related use or residential.		
Adjacent land use and conflicts	Industrial and residential.		
Known constraints and infrastructure requirements			
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Site is allocated as existing employment land under Policy DM12.		

Recommendation	Site score: C – average <p>This site should be protected for employment use as it is currently an important estate providing both industrial and D2 leisure uses. A lot of other industrial locations are owned by institutions therefore, only offering leasehold opportunities. This site, however, serves the owner-occupier market and is popular with local small to medium sized businesses and has a key role within the market.</p>
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Site Name: West Horton Farm Industrial Estate			
Site Ref:	E21		
Borough:	Eastleigh	Size (ha)	3.6
Description of Site and Location:	West Horton Industrial Estate is an urban fringe industrial estate in Bishopstoke, situated East of Eastleigh Town Centre.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	No	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	No	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Not known	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Not known	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	No	
1.7:	Is the site immediately available?	No	
Market Appraisal	The site is in a rural location requiring infrastructure works prior to any development potential.		
Adjacent land use and conflicts	Agricultural.		
Known constraints and infrastructure requirements			
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No	
Strategic Planning and Access	Site is in open countryside under policy CO9. Therefore, any redevelopment would not allow an intensification of the current uses. The built footprint and height of buildings would be required to be broadly in line with that existing.		
Recommendation	<p>Site score: E – low</p> <p>Access to the site is extremely limited. It could however, have a place in the market for those local, un-neighbourly businesses, that benefit from being situated in a more remote location.</p>		

Site Name: Royal London Park			
Site Ref:	E22		
Borough:	Eastleigh	Size (ha)	2.7
Description of Site and Location:	Royal London Park is an urban storage and distribution site in Hedge End adjacent to Charles Watts Way and accessed off Botley Road. Hedge End is a well established industrial and trade counter location.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?		Yes
1.2:	Has there been any recent development activity, within the last 5 years?		Yes
1.3:	Is the site being actively marketed as an employment site?		No
1.4:	Is the site owned by a developer or another agency known to undertake employment development?		Yes
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		No
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes
1.7:	Is the site immediately available?		No
Market Appraisal	The site in 2015 has been fully let by LSH to industrial, warehouse and a Sui Genesis use. Peter Cooper VW new car showroom that enhanced the rental value from £6.50 psf to £12.00 psf. The whole estate is owned by Royal London Asset Management and has undergone a comprehensive refurbishment in 2015		
Adjacent land use and conflicts	Industrial, retail, office and showroom		
Known constraints and infrastructure requirements			
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?		No
2.2:	Is the site identified or likely to be required for a specific user or specialist use?		No
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?		No
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?		N/A
Strategic Planning and Access	Site is allocated as existing employment land under Policy DM12.		

Recommendation	Site score: A – high This site is an established and popular industrial employment location, which should continue in this use for the foreseeable future. The estate benefits from excellent road connections, roadside prominence and suitable layout for its use.
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Site Name: Leigh Road Offices			
Site Ref:	E23		
Borough:	Eastleigh	Size (ha)	2.6
Description of Site and Location:	<p>Leigh Road is one of the main routes into Eastleigh town centre, occupying a prominent position a short distance from the High Street and Eastleigh Railway Station. Eastleigh is situated in close proximity of the M3/M27 intersection, enjoying good access to both motorways at J12 & 13 of the M3 and J5 of the M27.</p> <p>The site currently provides edge of centre offices in Eastleigh.</p> <p>Virtually all of the buildings are formerly residential houses that have been converted to mainly office use and therefore have limited on-site car parking but many enjoy either forecourt parking or rear vehicular access.</p>		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?	Yes		
1.2: Has there been any recent development activity, within the last 5 years?	No		
1.3: Is the site being actively marketed as an employment site?	Yes		
1.4: Is the site owned by a developer or another agency known to undertake employment development?	No		
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes		
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes		
1.7: Is the site immediately available?	No		
Market Appraisal	<p>The site is situated either side of one of the principal approach roads into Eastleigh Town Centre. Currently comprising a number of residential properties converted to offices. This employment site is suitable for roadside development, office development and residential</p> <p>This building appear to satisfy a local need for small self-contained office buildings for local business at an affordable level.</p> <p>The Police Station is due to close in the next 12 months or so and this is a sui generis use, which seems likely to move to residential use in the future.</p>		
Adjacent land use and conflicts	The site is bounded by residential style properties which have, in the main, been converted to office use.		
Known constraints and infrastructure requirements	None, that we are aware of.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?	No		
2.2: Is the site identified or likely to be required for a specific user or specialist use?	No		
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?	No		

<p>2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?</p>	<p>N/A</p>
<p>Strategic Planning and Access</p>	<p>Site lies within an area identified as suitable for office redevelopment.</p>
<p>Recommendation</p>	<p>Site score: D – below average</p> <p>The site should be retained for its existing employment use. The police station will be marketed shortly and has the potential for re-development, which could be for residential use.</p>

Site Name: Allington Lane Industrial Estate			
Site Ref:	E24		
Borough:	Eastleigh	Size (ha)	2.4
Description of Site and Location:	Allington Lane Industrial Estate is a countryside estate providing a number of small basic industrial units and open storage.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?		No
1.2:	Has there been any recent development activity, within the last 5 years?		No
1.3:	Is the site being actively marketed as an employment site?		No
1.4:	Is the site owned by a developer or another agency known to undertake employment development?		Not known
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Not known
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes
1.7:	Is the site immediately available?		Not known
Market Appraisal	The site is within a rural location with potential for employment related use which could include industrial and offices, albeit the road infrastructure would require improvement.		
Adjacent land use and conflicts	Agricultural and residential.		
Known constraints and infrastructure requirements	Road access.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?		No
2.2:	Is the site identified or likely to be required for a specific user or specialist use?		No
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?		No
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?		No
Strategic Planning and Access	Site is in open countryside under policy CO9. Therefore, any redevelopment would not allow an intensification of the current uses. The built footprint and height of buildings would be required to be broadly in line with that existing.		

Recommendation	Site score: E – low Access to the site is extremely limited. It could however, have a place in the market for those local, un-neighbourly businesses that benefit from being situated in a more remote location. This site provides an important role within its context and would serve a place in the market.
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Site Name: Coach House at Netley Firs Road			
Site Ref:	E25		
Borough:	Eastleigh	Size (ha)	1.8
Description of Site and Location:	Coach House at Netley Firs Road is an urban fringe site in Hedge End adjacent to the M27 to the west and residential to the east.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		No	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		No	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Not known	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		Not known	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		No	
1.7: Is the site immediately available?		No	
Market Appraisal	The site adjoins the M27 and is currently only accessible via a residential estate. We do not consider employment related use is appropriate on this site other than as a fringe or low grade site.		
Adjacent land use and conflicts	Residential.		
Known constraints and infrastructure requirements	Poor access.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance.		No	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		No	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?		No	
Strategic Planning and Access	Site lies within an identified "Countryside Gap" under Policy C9. As a result, in countryside gaps as defined on the policies map, development which physically or visually diminishes the gap, or has an urbanising effect detrimental to the openness of the gap, the character of the countryside or the separate identity of the adjoining settlements will not be permitted.		

<p>Recommendation</p>	<p>Site score: E – low</p> <p>In our opinion, redevelopment of this site would be inappropriate for employment uses with any intensity.</p>
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Site Name: Flanders Industrial Park			
Site Ref:	E26		
Borough:	Eastleigh	Size (ha)	1.8
Description of Site and Location:	Flanders Industrial Park is an urban industrial storage and distribution site in Hedge End. The site is within half a mile of J7 of M27, situated off Botley Road (B3035) in an established warehouse and industrial area adjacent to Hedge End retail park.		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?			Yes
1.2: Has there been any recent development activity, within the last 5 years?			No
1.3: Is the site being actively marketed as an employment site?			No
1.4: Is the site owned by a developer or another agency known to undertake employment development?			Yes
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?			No
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?			Yes
1.7: Is the site immediately available?			No - occupied
Market Appraisal	A popular industrial estate, well connected to the M27, Junction 7, and the Hedge End labour force, which was built in late 1980's and has remained occupied throughout. Fully developed with little scope for change in the short term.		
Adjacent land use and conflicts	Employment land including the Borough Depot, which could make a useful addition to the site		
Known constraints and infrastructure requirements	None.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?			No
2.2: Is the site identified or likely to be required for a specific user or specialist use?			No
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?			No
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?			N/A
Strategic Planning and Access	Site is allocated as existing employment land under Policy DM12		

Recommendation	Site score: A – high This site is an established and popular industrial employment location, which should continue in this use for the foreseeable future. The estate benefits from excellent road connections, roadside prominence and suitable layout for its use.
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Site Name: Hound Farm			
Site Ref:	E27		
Borough:	Eastleigh	Size (ha)	1.7
Description of Site and Location:	Hound Farm is a small countryside industrial site in Hound Corner off Hound Road linking to Hamble Lane.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	No	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Not known	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Not known	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	No	
Market Appraisal	<p>The site comprises a former farm conveniently located for Junction 8 of the M27 motorway. The farm buildings currently used by a range of businesses including motor trade.</p> <p>Suitable for small scale employment development, subject to the availability of services.</p>		
Adjacent land use and conflicts	Agricultural, residential and church.		
Known constraints and infrastructure requirements			
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known	
Strategic Planning and Access	<p>Site lies within an identified "Countryside Gap" under Policy C9. As a result, in countryside gaps as defined on the policies map, development which physically or visually diminishes the gap, or has an urbanising effect detrimental to the openness of the gap, the character of the countryside or the separate identity of the adjoining settlements will not be permitted.</p>		

Recommendation	Site score: D – below average Access to the site is limited, although it does have good connections to Junction 8 of the M27 motorway. Therefore, it could have a place in the market for those local, un-neighbourly businesses that benefit from being situated in a more remote location. This site provides an important role within its context and would serve a place in the market.
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Site Name: Stoneham Place			
Site Ref:	E28		
Borough:	Eastleigh	Size (ha)	1.4
Description of Site and Location:	Stoneham Place is a countryside office in Eastleigh with close proximity to J5 of the M27.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	Yes	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	No	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	No	
Market Appraisal	Established, popular office location with good parking, with a mix of refurbished and purpose built offices of good quality and convenient for motorway, rail and airport connections.		
Adjacent land use and conflicts	Close to hotel and club and recreation grounds and to future potential residential use.		
Known constraints and infrastructure requirements			
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known	
Strategic Planning and Access	Site lies within an identified "Countryside Gap" under Policy C9. As a result, in countryside gaps as defined on the policies map, development which physically or visually diminishes the gap, or has an urbanising effect detrimental to the openness of the gap, the character of the countryside or the separate identity of the adjoining settlements will not be permitted.		

<p>Recommendation</p>	<p>Site score: B – above average</p> <p>The site provides excellent employment accommodation in a location that has good connectivity, both rail and road, but with congestion issues, particularly at peak times. There have been some improvements made to the surrounding road network, particularly at Junction 5 of the M27 motorway, which should improve its accessibility.</p> <p>It is a sought after location and should be protected for continuing employment use.</p>
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Site Name: Ridge Farm, Grange Road			
Site Ref:	E29		
Borough:	Eastleigh	Size (ha)	1.1
Description of Site and Location:	<p>The site is located off Grange Road, 6 mins south west of J8 of M27. The M27 provides good road communications along the Solent Corridor, linking into the M3/A3(M) motorway network to the M25 and London.</p> <p>The site comprises a small industrial holding located on a countryside plot in Old Netley.</p>		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	No	
1.3:	Is the site being actively marketed as an employment site?	Yes	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Unknown	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Unknown	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	Yes	
Market Appraisal	This site fills an important function in providing small and affordable premises for local businesses.		
Adjacent land use and conflicts	Residential and agricultural.		
Known constraints and infrastructure requirements	Poor vehicular access and conflicts with neighbouring uses.		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance.	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	Not known	
Strategic Planning and Access	Site lies within an identified "Countryside Gap" under Policy C9. As a result, in countryside gaps as defined on the policies map, development which physically or visually diminishes the gap, or has an urbanising effect detrimental to the openness of the gap, the character of the countryside or the separate identity of the adjoining settlements will not be permitted.		

Recommendation	Site score: E – low
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Site Name: Deacons Boat Yard			
Site Ref:	E30		
Borough:	Eastleigh	Size (ha)	1.0
Description of Site and Location:	<p>Deacons boatyard is located in Bursledon, Southampton. It is located 4 mins south of J8 of M27. The M27 provides good road communications along the Solent Corridor, linking into the M3/A3(M) motorway network to the M25 and London.</p> <p>It currently provides boatbuilding services and DIY yard space.</p>		
Market Attractiveness Criteria:			
1.1: Has the site been formally identified for employment for at least 10 years?		Yes	
1.2: Has there been any recent development activity, within the last 5 years?		No	
1.3: Is the site being actively marketed as an employment site?		Yes	
1.4: Is the site owned by a developer or another agency known to undertake employment development?		Yes	
1.5: Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?		No	
1.6: Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?		Yes	
1.7: Is the site immediately available?		Yes	
Market Appraisal	<p>Typical boatyard, alongside River Hamble with floating mooring pontoons and open storage for boat park.</p> <p>Range of buildings of permanent and temporary character for repair and maintenance of pleasure craft plus some quasi-retail. The waterside location creates a premium value in marine related use.</p> <p>Convenient for Junctions 8 and 9 of the M27 motorway.</p>		
Adjacent land use and conflicts	Leisure and residential, although adjacent railway line is a buffer to the west.		
Known constraints and infrastructure requirements	Flood risk and long narrow shape of site.		
Strategic Planning Factors			
2.1: Is the site within an area identified as of strategic importance?		No	
2.2: Is the site identified or likely to be required for a specific user or specialist use?		Yes – Maritime uses	
2.3: Is the site part of a comprehensive or long term development or regeneration proposal?		No	
2.4: Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?		N/A	
Strategic Planning and Access	Site is protected for continued marina and port use under policy DM18.		

Recommendation	<p>Site score: C – average</p> <p>As with other marine related sites it provides a valuable and important function, supporting local marine and leisure uses. It should therefore be protected for these occupier types and associated businesses.</p> <p>Unlike the sites identified in Hamble, this site has greater prominence and access to the A27 and M27 motorway. Swanwick Marina has also been re-developed, which has improved the profile of this location.</p> <p>This site will however, will be under pressure from retail uses. Residential will be unlikely due to its proximity to the flood plain and railway line.</p> <p>Due to its function it is not comparable with other more traditional industrial sites within the study areas.</p>
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Site Name: Southampton Road Offices			
Site Ref:	E31		
Borough:	Eastleigh	Size (ha)	0.8
Description of Site and Location:	Southampton Road Offices are town centre offices in Eastleigh, conveniently located adjacent to Eastleigh train station and the town centre.		
Market Attractiveness Criteria:			
1.1:	Has the site been formally identified for employment for at least 10 years?	Yes	
1.2:	Has there been any recent development activity, within the last 5 years?	Yes	
1.3:	Is the site being actively marketed as an employment site?	Yes	
1.4:	Is the site owned by a developer or another agency known to undertake employment development?	Yes	
1.5:	Is the site in multiple ownership/occupation, or owned by an organisation unlikely to bring it forward for development?	Yes	
1.6:	Would employment development on this site be viable, without public funding to resolve infrastructure or other on-site constraints?	Yes	
1.7:	Is the site immediately available?	Yes	
Market Appraisal	<p>Traditional office location well located for public transport and town centre facilities. Buildings not up to best modern standards in terms of floor plate sizes and features, but have been subject to some refurbishment.</p> <p>Could be of interest for residential use and therefore under pressure for change of use, should commercial occupation cease.</p>		
Adjacent land use and conflicts	Mixed use area with retail and hotel.		
Known constraints and infrastructure requirements	N/A		
Strategic Planning Factors			
2.1:	Is the site within an area identified as of strategic importance?	No	
2.2:	Is the site identified or likely to be required for a specific user or specialist use?	No	
2.3:	Is the site part of a comprehensive or long term development or regeneration proposal?	No	
2.4:	Is there public funding committed (or likely to be provided) sufficient to overcome infrastructure or on-site constraints to make employment development viable?	No	
Strategic Planning and Access	Site benefits from good town centre location, with the location of the use supported by the NPPF.		

Recommendation	Site score: B – above average Whilst the location has excellent connectivity, the location suffers relatively weak demand from office occupiers, owing to Eastleigh's town centre lacking vitality. The Swan Centre has become the prime retail location for the town and this has had an impact on the High Street. The site will continue to be of interest to local occupiers.
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