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Planning Design Economics

ROSSENDALE EMPLOYMENT LAND STUDY – FINAL REPORT

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Contents

Appendices

Tables

1.0 Introduction

1.1 This Employment Land Study (ELS) has been commissioned by Rossendale Borough Council to inform the Local Development Framework (LDF) Core Strategy and Site Specific Allocations DPDs. It is designed to be an update to the Employment Land Review carried out in 2007 by King Sturge (hereafter referred to as 'the King Sturge report'). This report comprises Stages 1, 2 and 3 of the ELS in accordance with the Government Guidance[1] and will inform Rossendale's emerging Core Strategy and Allocations DPD.

1.2 The main objectives of the study are to:

- assess the future demand for employment land within the Borough over the plan period;
- assess the future supply of sites suitable for employment use within Rossendale;
- assess the suitability of individual sites including existing sites, allocated sites and sites identified through the 'call for sites';
- identify employment sites that are unlikely to be required by the market or are now unsustainable for employment development;
- identify sites that are critical to the delivery of sustainable economic development over the plan period; and
- provide a robust and transparent component of the evidence base to support Rossendale's Local Development Framework.

1.3 The study's approach generally follows Government guidance on undertaking employment land reviews.[1] It focuses on employment space needs for the group of B Use Classes i.e. B1a (business), B1b/c/B2 (industry) and B8 (warehousing/distribution). It does not assess the future land needs of other employment generating uses such as retail, tourism, healthcare and education although the potential employment growth and labour requirements of such uses are considered. Requirements for both employment land and floorspace are considered in the study, and references to "employment space" are intended to mean both these elements. Industrial space in this report includes both manufacturing and distribution uses (i.e. use classes B1b/c/B2 and B8).

1.4 The overall process by which employment needs have been assessed, and how these would feed into the LDF process, is illustrated by Figure 1.1. A key input to this process was consultation with various organisations with an interest in the supply of employment land including employers, economic development and inward investment agencies, business groups, property agents and developers.

1.5 As well as the previous King Sturge report, the study also draws on employment land studies prepared in adjoining districts and other relevant documents including planning policy guidance, property market information, local and

[1] Employment Land Reviews Guidance Note, ODPM (2004)

regional economic strategy documents, planning policy documents, economic sector studies and published economic statistics. These are listed in the Reference Documents section of the Appendices.

1.6 A glossary of terms if provided at **Appendix 1**.

1.7 The report is structured as follows:

• **Economic Context** (Section 2)	An overview of current economic conditions and recent trends in the Borough and adjoining areas that may affect the need for employment space.
• **The Current Stock of Employment Space** (Section 3)	A quantitative assessment of the current stock of employment space in the Borough, including levels and types of provision and recent changes in supply as well as major developments and employment land supply in nearby areas.
• **The Rossendale Commercial Property Market** (Section 4)	A review of the Rossendale property market, particularly demand for and supply of different types of employment space and any gaps in provision.
• **Review of Current Employment Sites and Allocations** (Section 5)	A review of existing or allocated employment sites in the Borough in terms of their quality and adequacy to meet future needs.
• **Economic Potential and Growth Sectors** (Section 6)	Consideration of the potential future economic role of the Borough and specific sectors which have potential for growth.
• **Future Employment Space Requirements** (Section 7)	Estimates of future employment space requirements in both quantitative and qualitative terms, drawing on past take-up of land, forecast employment growth and other factors.
• **The Demand / Supply Balance** (Section 8)	An assessment of the balance of supply/demand of employment land, identifying how much additional land, and what types, need to be allocated and any sites to be re-allocated for other uses.
• **Supporting Economic Growth** (Section 9)	Consideration of other measures needed to support economic growth in Rossendale including upgrading of the current stock of employment space.
• **Conclusions** (Section 10)	Overall conclusions and recommendations for the study.

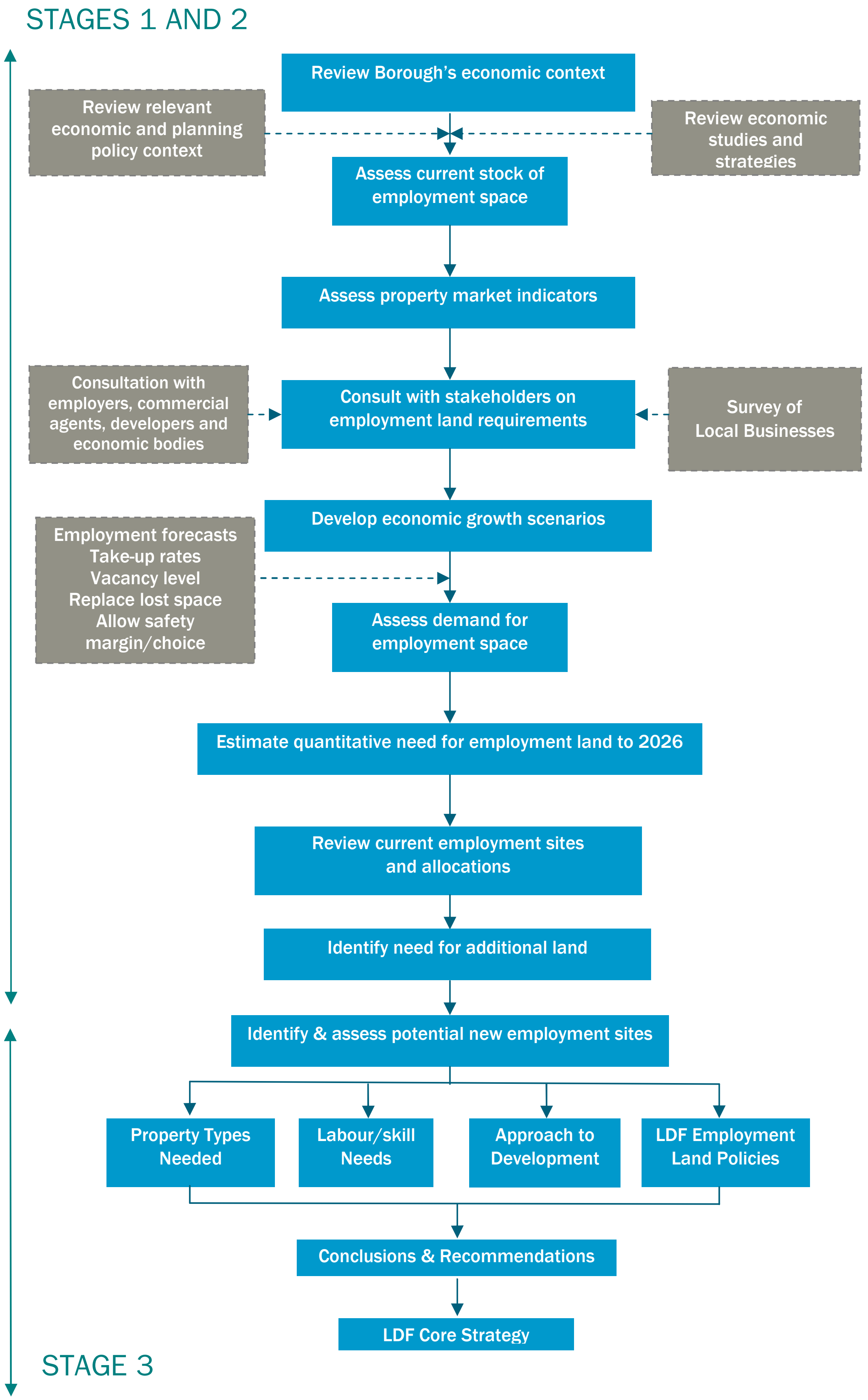


Fig 1.1 Rossendale Employment Land Review Methodology

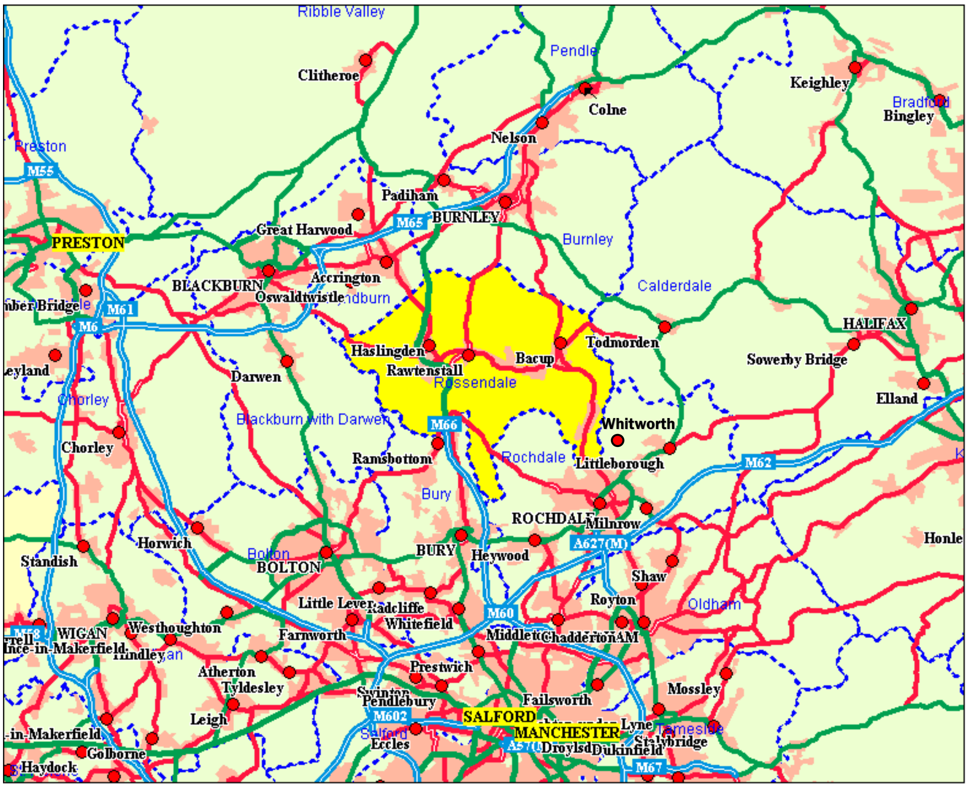
2.0 # Economic Overview

2.1 This Chapter establishes the economic context for the study by reviewing recent economic conditions and trends within Rossendale Borough in the context of neighbouring Boroughs, the North West region and the national economy. This is important in identifying the existing strengths and weaknesses of the Rossendale economy, and the factors likely to influence the nature and level of future demand for employment land within the Borough.

The Borough

2.2 Rossendale is situated some 25 km to the north of Manchester within the North West region. It comprises a mainly rural area and the four main settlements of Rawtenstall (population 22,000), Haslingden (17,000), Bacup (13,000) and Whitworth (7,000). These urban areas are situated in the narrow Irwell River Valley and Spodden River Valley running between the Pennine uplands which are very sparsely populated. The Borough is bounded to the south by the Greater Manchester districts of Bury and Rochdale, in the east by Calderdale within West Yorkshire, and to the north and north-west by the Lancashire Districts of Burnley, Hyndburn and Blackburn-with-Darwen (Figure 2.1).

Fig 2.1 Sub-regional context of Rossendale



2.3 In terms of accessibility, Rossendale is served by the M66/A56 trunk road which lies on a north-south axis and links the Borough to Bury, Heywood, Manchester, Blackburn and Burnley as well as the M62 and M65 corridors. At present there are no scheduled train services within the Borough although it is understood that feasibility work is being undertaken on returning commuter services to the preserved East Lancashire Railway which runs through the Irwell Valley from Rawtenstall through Bury to Heywood, where it could link to the national rail network. The nearest airports with scheduled services are Manchester, some 40 km away, Blackpool, around 45km to the west and Liverpool, which is around 55 km away.

2.4 The Borough has no higher or further education facilities, with the nearest alternative facilities located in Accrington, Burnley, Rochdale and Bury, which all have colleges offering some further education qualifications, while Manchester has two universities. However, it is understood that there may potentially be funding for a vocational training centre in the east of the Borough.

2.5 Rossendale is not subject to any EU designations relating to financial assistance programmes. It is also not covered by Tiers 1 or 2 of the UK's Selective Finance for Investment programme although businesses can obtain grants under Tier 3. However, some nearby areas such as Blackburn, Burnley, Merseyside and Oldham have Tier 2 status.

2.6 Rossendale Council is currently in the process of setting up a collaboration to provide Pennine Way-wide business 'start-up' funding.

Economic Activity

2.7 Over the last 30 years, the Rossendale economy has been characterised by slow or negative economic growth, a lack of local employment opportunities and long-term contraction of established local industries such as textiles, clothing and footwear. The legacy of industrial use has left many employment sites with remediation issues or the need for costly redevelopment for other uses. Furthermore, the Borough's topography has resulted in there being relatively little flat land available for development and many existing sites adjoin the River Irwell and residential areas, often suffering from flooding and amenity issues. However, the attractive countryside and good road links have made parts of the Borough a popular residential area for commuters, particularly to Manchester and Bury, and the Borough is developing a role as a centre for outdoor sports.

2.8 There are relatively few large firms in the Borough with just 0.9% of businesses having more than 100 employees and none with over 500, a level below that of the North West generally (1.6%) and nationally (1.5%). Rossendale also has a high proportion (86%) of very small firms (0-9 employees), a level higher than the regional (82%) and national (83%) proportions (Table 1, Appendix 2). The Borough also has relatively fewer medium-size firms (10-99 employees) compared with the North West and national averages.

2.9 The largest private sector employers in Rossendale apart from retailers are manufacturing firms and include;

- i Interfloor – manufacturers of floor underlay who employ around 300 people in Haslingden;
- ii J and J Ormerod – manufactures and suppliers of kitchen and bedroom fittings who are based in Bacup and employ around 300 people; and
- iii Madison Filter Ltd – manufacturers of a range of wet & dry filtration and screening products for various industries who employ around 250 people in Haslingden.

2.10 In the public sector, the Council is a major employer in the Borough with approximately 200 employees.

2.11 Guidelines have recently been prepared on business start up funding for the Borough and these are awaiting approval. As part of the business start up funding scheme, grants are available in the form of a contribution towards the capital costs of refurbishing vacant commercial properties. They can be used to assist in meeting the refurbishment costs of either an existing business seeking to re-locate into the Rossendale Borough or towards meeting the costs of refurbishing a building for the establishment of a new business. Grants can be in the form of a contribution towards the total eligible costs to a maximum of £20,000. Applications for assistance above the £20,000 limit will only be considered in exceptional circumstances where the business can demonstrate the continued provision of a significant number of jobs within the Borough or the significant employment of local residents and/or the use of local contractors. Applications must be approved prior to expenditure taking place. The scheme is initially funded until March 2011 and is open to applications until that time (subject to funding remaining available within the scheme)

Economic Trends

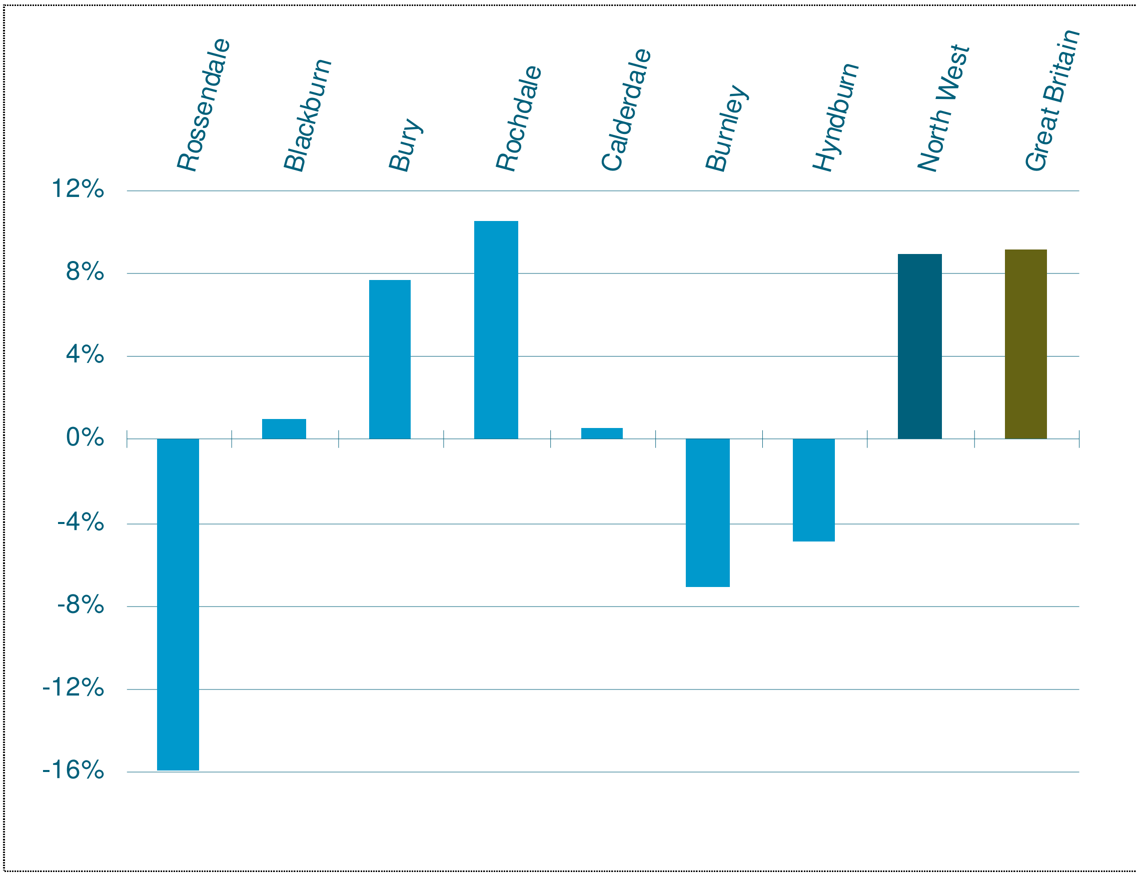
2.12 Recent economic trends in the Borough are summarised below, with detailed statistics contained in Appendix 2. These allow the recent performance of Rossendale's economy to be compared with Lancashire, the North West region, and Great Britain.

2.13 The resident population of the Borough in 2007 was estimated at 67,000, up from 65,300 in 1997 – a rise of only 2.6% over the decade compared with national growth of 4.5%. Rossendale's housing stock has seen modest growth in recent years, with 1,087 net additional dwellings completed between 2001 and 2006. This represents a 3.8% increase in the housing stock in five years, marginally above the national rate of 3.4%.[2]

2.14 In 2007, Rossendale contained some 21,500 employee jobs, a decrease of 15.9% since 1998, while the North West (+8.9%) and Great Britain (+9.2%) all showed significant employment gains over the period.[3] Rossendale also recorded a far greater contraction in employment than adjoining Boroughs (Figure 2.2) (Appendix 2, Table 2).

[2] Based on Rossendale Annual Monitoring Reports, CLG housing data and census dwelling count.
[3] Based on Annual Business Inquiry, 2007

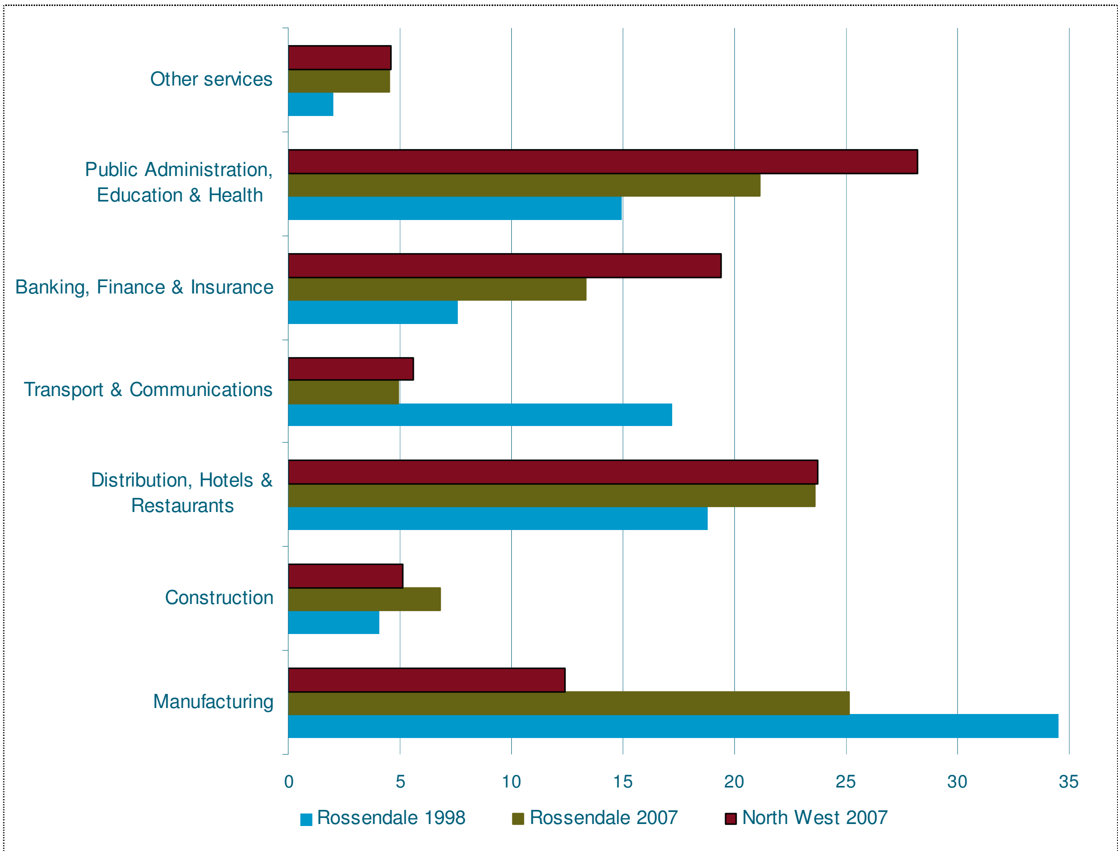
Fig 2.2 Percentage Change in Employment 1998-2007.



Source: Annual Business Inquiry

2.15 In employment terms, Rossendale's main industrial sectors are manufacturing (25.1%), distribution, hotels and catering (23.6%) and public administration, health and education (21.1%) (Figure 2.3). The manufacturing sector accounts for a much higher proportion of local employment than in the region, although public administration is under-represented and distribution's share is similar to regional rates. The typically more dynamic sector of banking and finance (13.3%) is significantly under-represented compared with the region (19.4%) and Great Britain (21.6%) (Appendix 2, Table 3). The tourism sector employs about 7.4% of the workforce locally, slightly lower than the regional (8.4%) and national averages (8.2%).

Fig 2.3 Percentage of Total Employment by Sector.



Source: Annual Business Inquiry

2.16 Over the period 1998-2007, the fastest growing sectors in the Borough in job terms were other services (+87.1%) (for example library, museums and other cultural activities; sporting and other recreational activities; and sewage/refuse disposal) and banking, finance and insurance (+46.2%). Both of these sectors grew much faster than national rates. The construction sector also underwent significant growth (40%), much higher than national growth in that sector (16.5%). However, the transport and communication sector suffered major contraction (-76.2%) despite the national trend being one of modest growth (+10.3%). Manufacturing in Rossendale also declined rapidly (-39%), and by more than the national fall of around 30% (Appendix 2, Table 4).

2.17 Between 1994 and 2008, the number of VAT registered firms[4] in the Borough grew by around 13%, lower than the County (16%), regional (20%) and national (25%) growth rates (Appendix 2, Table 5). However, with 45 VAT registrations per 10,000 population in 2007[5], Rossendale's rate of new business formation

[4] Firms must be VAT Registered if the value of their taxable supplies in the past 12 months or less has exceeded the current VAT registration threshold of £67,000, or if the value of their taxable supplies in the next 30 days alone is expected to exceed this threshold. Source: HM Revenue and Customs VAT Notice 700/1.
[5] Resident population over 16 years of age

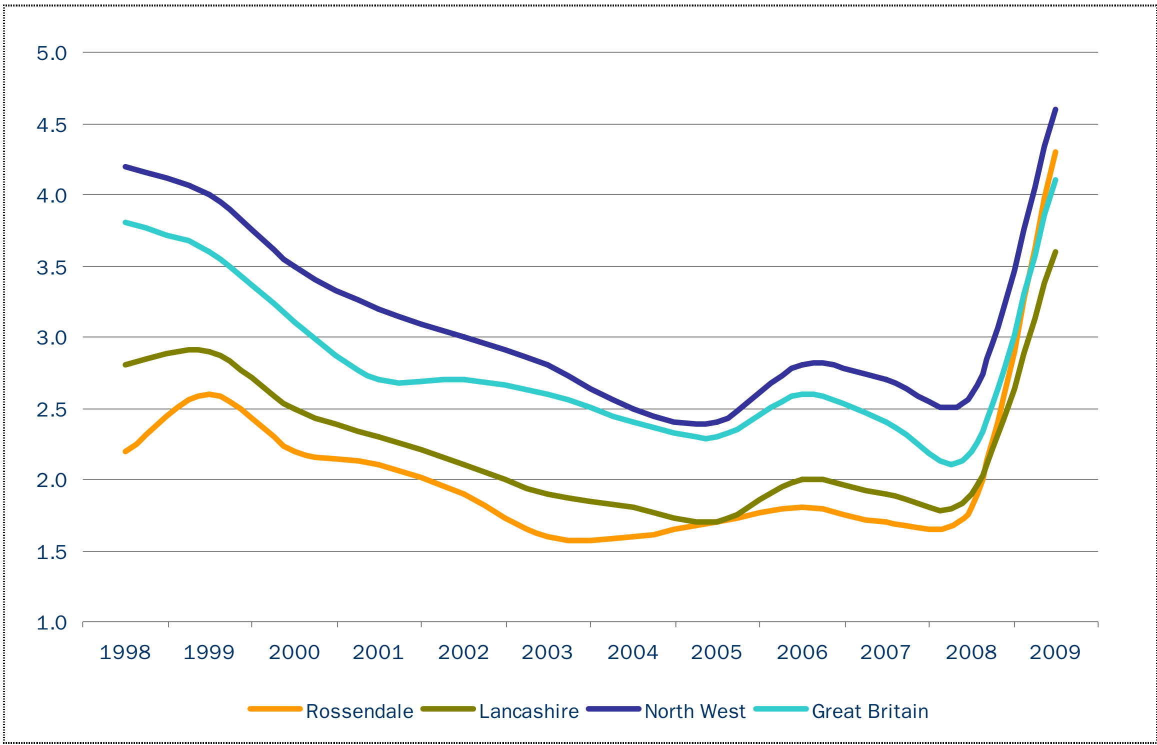
is above that of Lancashire (35), the North West region (37) and Great Britain (42) suggesting some recent improvement in entrepreneurial activity locally (Appendix 2, Table 6).

2.18 Survival rates of new businesses are relatively low in Rossendale; by the end of 2005, 68% of new businesses formed in the District three years earlier were still trading, compared with 73% for Lancashire as a whole and 71% for the North West region[6].

2.19 In line with the national picture, unemployment rates in Rossendale have increased; in November 2008 Rossendale had a claimant unemployment rate of 2.7% compared to the March 2009 of 4.2%. The Borough has slightly lower claimant unemployment than the average for the North West region (4.5%) but higher rates than experienced nationally (4.0%) (Appendix 2, Table 7). Unemployment below County and regional rates has prevailed in Rossendale over the past decade (Figure 2.4) although it has risen rapidly in the past year to exceed the Lancashire average for the first time in over a decade and has recently started to exceed the national average, largely due to significant industrial closures. The wider ILO unemployment rate for the Borough (4.8%) – which includes those seeking work but not claiming benefits – is below the comparable rates for Great Britain (5.3%) and the North West (5.9%).[7] This suggests that whilst unemployment is lower than may be expected, the level of unemployment means that there is some capacity for new employment growth. Long-term unemployment in Rossendale (3.5%) is very low in comparison with the regional (7.9%) and national (7.6%) figures.[8]

[6] Source: Survival Rates of VAT-Registered Enterprises, DTI Small Business Service, February 2007
[7] The International Labour Organisation (ILO) measure indicates total number unemployed and actively seeking work. The most recent published data is for the year to March 2008.
[8] % of claimant unemployed who are out of work for over 12 months

Fig 2.4 Claimant Unemployment (% of working population).



Source: Nomis

2.20 In October 2008, there were 3.6 claimant unemployed workers for every notified job centre vacancy in the Borough. This was significantly higher than the ratios for Lancashire (1.9), the North West (2.6) and nationally (2.6). By March 2009, the number of claimant unemployment workers for every notified job centre vacancy in the Borough had increased significantly to 14.9. The equivalent ratios had also increased for Lancashire (to 4.6), the North West (7.9) and nationally (7.6) but this increase was not nearly as dramatic as in Rossendale. This indicates poorer prospects of unemployed residents obtaining work locally compared with other nearby areas and that there may be some surplus capacity in the labour market (Appendix 2, Table 8).

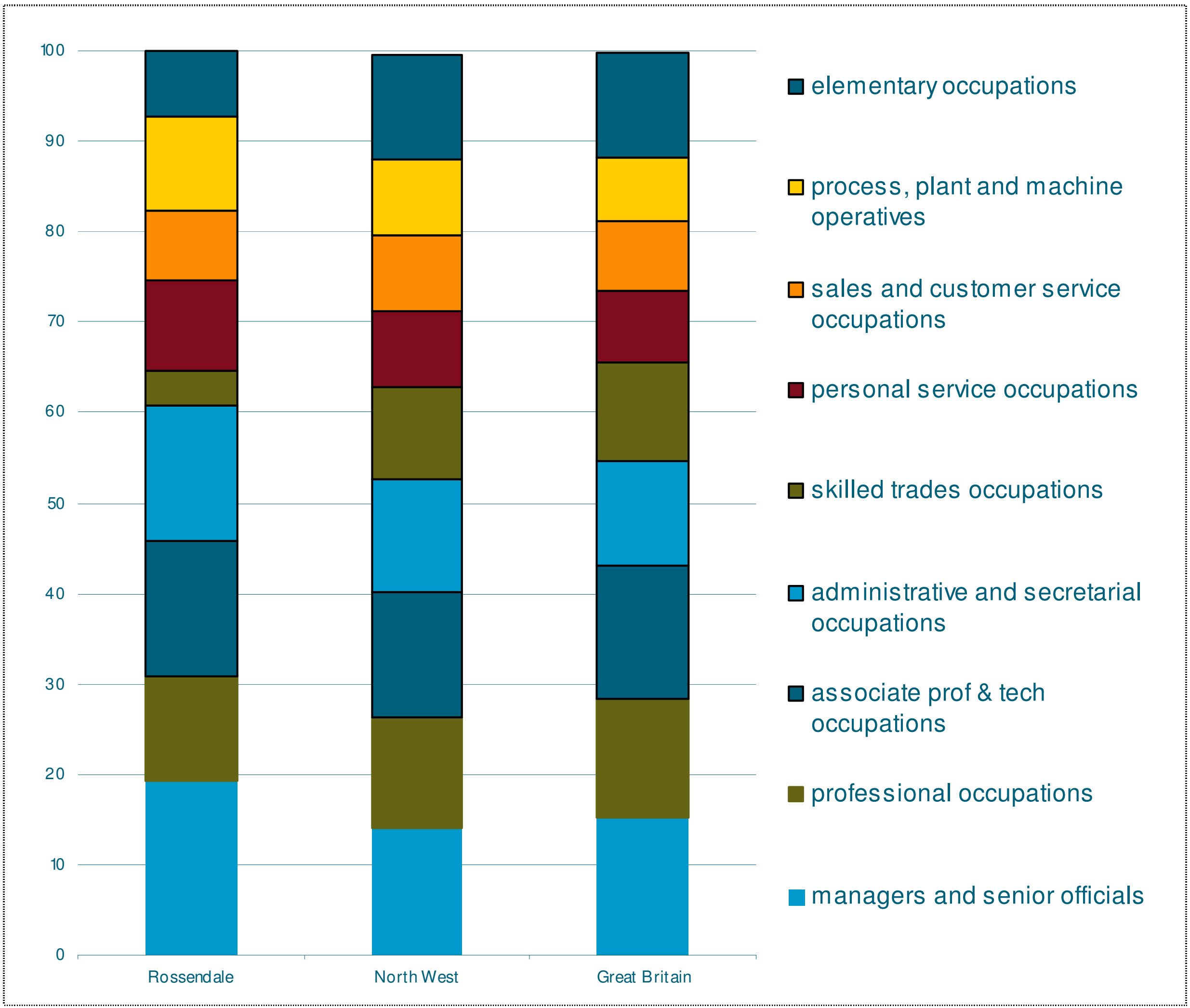
2.21 However, there appears to be only limited scope to expand the indigenous local labour supply should employment demand grow in future (Appendix 2, Table 9). This reflects the local economic activity rate (81.8%) being already above that of the North West (76.8%) and the national rate (78.6%).

2.22 Overall, Rossendale's labour force has more, highly skilled occupations and fewer, lower skilled manual jobs than the North West region although the situation is mixed in comparison to national averages. In particular, there is a significantly higher proportion of residents in managerial, professional and associate professional occupations, accounting for 46% of workers compared with 40% in the North West and 43% nationally. At the same time, the

Borough's proportion of residents in lower skilled occupations[9] is 35%, lower than the North West (37%) although similar to the national average (34%) (Appendix 2, Table 10 and Figure 2.5).

2.23 In summary, claimant unemployment below County and regional rates has prevailed in Rossendale over the past decade, but increased rapidly in 2008-2009 to exceed the Lancashire and in some cases national average. However, the wider ILO unemployment rate for Rossendale is below the regional and national average.

Fig 2.5 Occupational Profile of Labour Force.



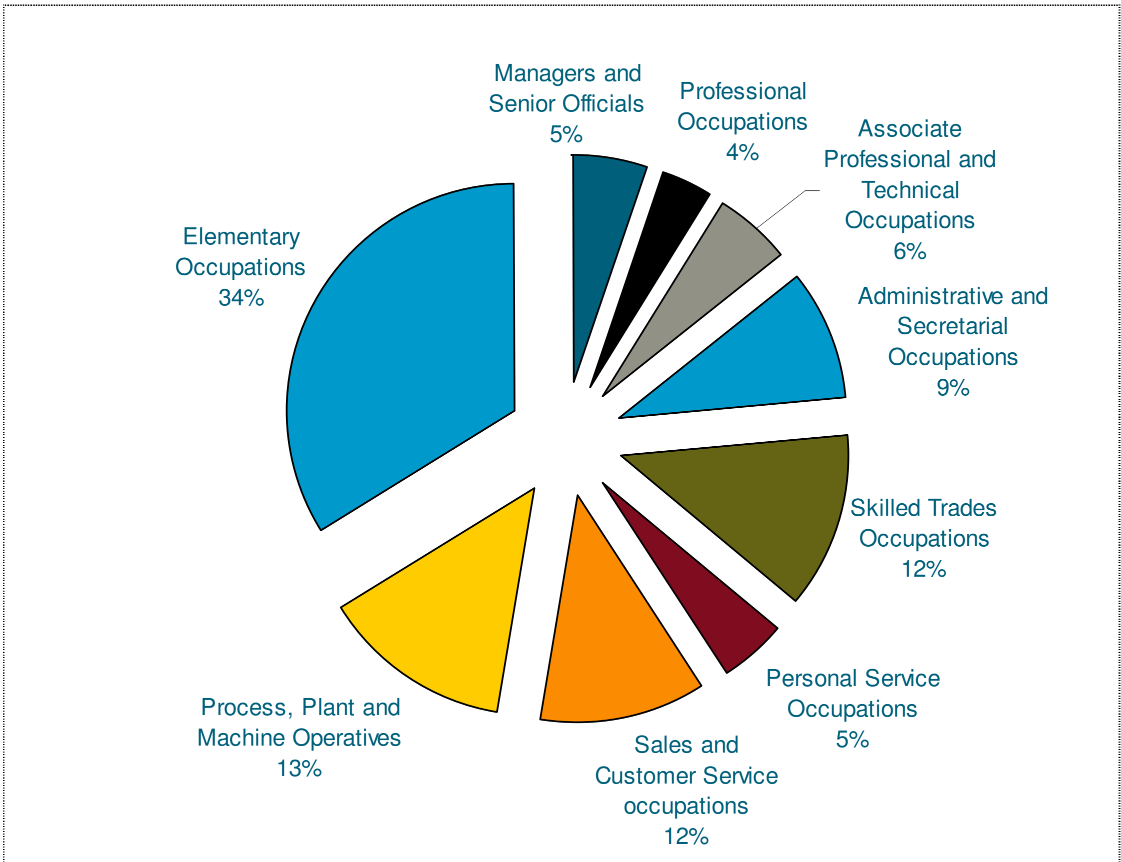
Source: Annual Population Survey (March 2008)

[9] This includes Elementary Occupations, Process Plant & Machine Operatives, Sales and Customer Service Occupations and Personal Service Occupations

2.24 This relatively highly skilled nature of residents' occupations presents an interesting contrast with the skill levels of Rossendale's workforce which are not very high. The proportion of residents with higher-level qualifications is relatively low with only 22.3% of working-age residents having a degree or higher qualification, below the regional (25.4%) and national (28.6%) averages (Appendix 2, Table 11). On the other hand, the proportion of residents with no qualifications (12.3%) is slightly lower than the national rate (13.1%) and significantly below the regional rate (15.0%).

2.25 Turning to the types of jobs required in the area, the most sought occupations amongst claimant unemployed workers in Rossendale are elementary / unskilled work (34%), sales and customer services (15%) and skilled trades (11%) (Figure 2.6). At the same time, demand for lower skilled and manual industrial jobs (process plant/machine operatives) is greater in Rossendale than the regional average (Appendix 2, Table 12). Demand for managerial and professional jobs (15%) is higher than the proportion for the North West (12%) but similar to the national average (14%).

Fig 2.6 Sought Occupations of Claimant Unemployed in Rossendale.



Source: Nomis, October 2008

2.26 Average wage levels of working residents of the Borough are similar to County and regional averages, and around 5% below the national average (Appendix 2, Table 13). However, workplace earnings in Rossendale are much lower, being 24% below the national average and 20% below the regional average. This reflects the types of jobs most common within Rossendale being generally lower paid. It also suggests that, in common with many other nearby Boroughs, many residents are commuting out of Rossendale to better paid jobs elsewhere, particularly in Manchester. At the same time, the proportion of residents claiming benefits (15.3%) is higher than the County (14.2%) and national rates (13.9%).

2.27 Rossendale has relatively high levels of deprivation, being ranked as the 92nd most deprived out of 354 English local authorities measured by the English Indices of Deprivation 2007 (Appendix 2, Table 14). Although this places the Borough within the most deprived 30% of local authority areas, it is substantially better off than some nearby areas such as Blackburn (17th), Burnley (21st) and Rochdale (25th), all of which lie within the top 10%. At a more local level, Rawtenstall and Haslingden contain several areas[10] of concentrated deprivation, with three 'Super Output Areas' among the 10% most deprived of such areas nationally. This is in sharp contrast to many of the more rural areas and smaller villages in the Borough, which are among the 20% least deprived areas in England and Wales.

Inward Investment

2.28 The Borough has had only limited success in attracting investment in recent years. Since 2006, the Council have only been involved with 3 firms moving into new premises in Rossendale. Two of these were relocations and one was a new business. However, it should be noted that companies are not asked for follow-up data and around two-thirds of firms making enquiries have no further contact with the Council.

2.29 The Council received around 120 property-related enquiries between April 2006 and April 2008, although only 26 were with regard to the potential relocation of a business to the Borough. Where a geographical origin for these enquiries was obtained, 94% were from within Lancashire, suggesting that demand is relatively localised.

Knowledge-based Industries

2.30 Knowledge-based industries are those sectors of the economy where value-added is derived from the intensity and accumulation of knowledge, often fostered through innovation and increasing use of technology. Firms within this sector tend to grow faster and have greater future potential than other sectors, and so are considered an important indicator of an economy's competitiveness and future growth prospects. As below shows, only 15.7% of firms within

[10] Lower-layer Super Output Areas, of which there are 44 in the District

Rossendale are within knowledge-based industries. This is lower than the regional (18.6%) and national averages (20.5%) although proportions within surrounding Boroughs are generally similar or below the level in Rossendale.[11]

Table 2.1 Proportion of Knowledge-based Businesses

District	2005 (%)
Rossendale	**15.7**
Blackburn-with-Darwen	15.2
Bury	17.7
Rochdale	13.4
Calderdale	15.2
Burnley	13.3
Hyndburn	10.0
North West	**18.6**
United Kingdom	**20.5**

Source: UK Competitiveness Index 2008

Commuting

2.31 In 2001, approximately 13,940 residents travelled out of Rossendale Borough to work elsewhere. The main destinations were adjoining Boroughs such as Rochdale, Bury, Hyndburn and Burnley although there was also a significant flow (4.8%) to central Manchester (Table 15 of Appendix 2). This out-commuting was equivalent to about 47% of all employed residents. At the same time, approximately 7,060 residents of other Boroughs commuted into Rossendale to work – again predominantly from adjoining Boroughs – equivalent to just over 30% of all workplace jobs in the Borough being filled by non-residents. This produces a net out-flow of around about 6,870 residents, or 23% of the Borough's resident workforce.

2.32 An area's self-containment rate reflects the proportion of working age residents in work locally, as opposed to commuting elsewhere. In Rossendale, the self-containment rate in 2001 was a relatively low 53%. This rate is below that in other nearby Boroughs such as Blackburn-with-Darwen, Calderdale and Burnley but higher than Bury, which has high rates of out-commuting, in particular to nearby Manchester (Appendix 2, Table 16).

[11] Based on definition adopted by the Organisation for Economic Co-operation and Development (OECD), includes high-tech manufacturing activities such as pharmaceuticals, computers and aerospace, and services such as telecommunications, financial intermediation, computing and research and development.

Conclusions

2.33 Rossendale is a mainly rural area with no major economic centres and no large firms. It has a relatively small economy which has undergone recent employment contraction. Relatively strong growth in business, financial and other services has not been sufficient to offset a substantial decline in the Borough's manufacturing base and the transport and communications sectors. Unemployment is low, although has recently started exceeding county levels and incomes similar to average but mainly because many residents work outside the Borough. Summarising the above analysis, the economic strengths of the Borough, which will influence its ability to support new employment space in future, are:

- reasonable transport accessibility to the M62 and the M65 corridors by virtue of the A56 which passes through the Borough;
- strong recent growth in business, financial and other service activities;
- low workplace wage levels (a strength from a potential employer's point of view);
- reasonable housing costs combined with proximity to attractive countryside; and
- improving rates of business start-up in recent years.

2.34 Weaknesses and potential threats include:

- its small local economy with recent employment contraction giving a smaller base from which to generate growth;
- proximity to the much larger economy of Greater Manchester;
- poor accessibility in the east of the Borough;
- lack of any large town or flagship business location;
- the small number of local jobs forcing many residents to commute elsewhere for work;
- relatively few residents with higher level skills;
- over-representation in contracting sectors such as manufacturing;
- rapid recent increases in unemployment; and
- low levels of inward investment and relocations from elsewhere.

3.0 The Current Stock of Employment Space

3.1 This section provides an overview of the current stock of employment space in the Borough, as well as recent trends in and changes to that supply. Also examined is the amount of such space likely to come forward in Rossendale in future, and losses to the current stock. In addition, the current supply of employment space in adjoining Boroughs is reviewed along with major B class development proposals in the surrounding area that could affect demand in Rossendale.

3.2 Both the amount of employment land and the quantity of built employment floorspace are considered across the main types of employment uses – primarily offices (use class B1(a)), warehousing/distribution (B8) and manufacturing industry (B1(c)/B2). Trends in the supply of employment space in the Borough were assessed from the following sources:

1 Commercial floorspace data from the ONS and the Valuation Office Agency (VOA); and
2 Rossendale Borough Council's monitoring data on B class completions and losses, as well as the amount of land recorded as available for employment development.

Main Employment Areas

3.3 The main existing employment areas within the Borough, illustrated in the Maps in Appendix 3, are:

1 a large industrial area (24 ha) on the western edge of Haslingden, adjacent to the A56 dual carriageway, which includes the Carrs, Waterside and Three Point Industrial Estates as well as the Birtwistle Mill complex;
2 the Knowlsey Road Industrial Estate (11 ha), also in Haslingden, which contains a variety of warehouse and industrial uses;
3 several employment sites in Stubbins (10 ha in total) which include the Georgia Pacific Paper production facility and the Cuba Industrial Estate;
4 a variety of employment sites within Rawtenstall including the town centre, Newhallhey (a leisure and business park) and a number of single-occupier industrial sites such as those for Lambert Howarth and Jacobsen Footware;
5 a large employment site (8 ha), situated between Waterfoot and Rawtenstall and adjacent to the Irwell and Bacup Road, which contains a variety of industrial premises as well as the Hugh Business Park; and
6 a large, varied employment area (11 ha) in the centre of Bacup which includes the town centre, a number of small industrial estates, offices, and mill complexes.

Stock of Employment Floorspace

3.4 Table 3.1 shows the number of B class employment-generating premises in Rossendale and nearby Boroughs by main use categories. This shows that

Rossendale has significantly fewer employment premises than all other nearby Boroughs.

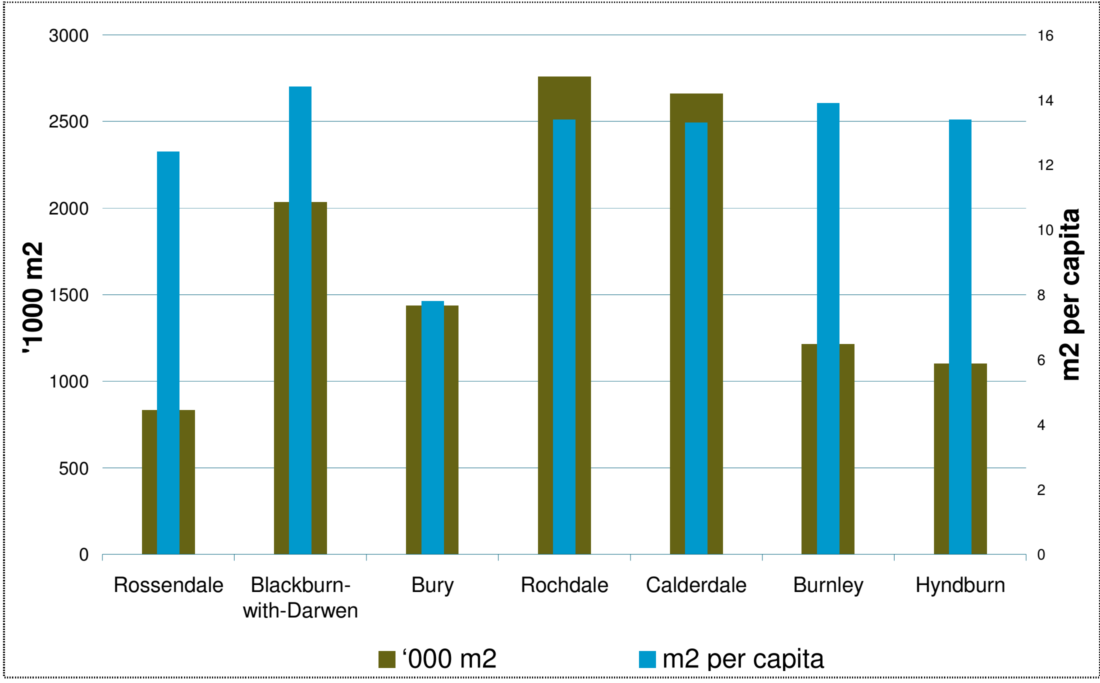
Table 3.1 Number of Employment Premises, 2007.

Borough	Commercial Offices	Factories	Warehouses	All Types
Rossendale	218	548	453	**1,219**
Blackburn-with-Darwen	728	1,067	790	**2,585**
Bury	471	951	657	**2,079**
Rochdale	701	1,276	953	**2,930**
Calderdale	1,098	1,602	1,458	**4,158**
Burnley	405	517	507	**1,429**
Hyndburn	265	627	609	**1,501**

Source: Nomis/VOA, 2007

3.5 The total amounts of B class employment floorspace by main uses in Rossendale and in adjoining Boroughs are shown in Figure 3.1. This indicates that Rossendale has the lowest level of such employment space of all nearby Boroughs. However, this is partly due to the small size of the Borough in population terms and the lack of major urban centres. In terms of employment space per capita, Rossendale has a comparable, if slightly lower, amount of commercial office, factory and warehousing land than all surrounding Boroughs except Bury (see Table 18, Appendix 2)

Fig 3.1 B-Class Employment Floorspace, 2007[12]

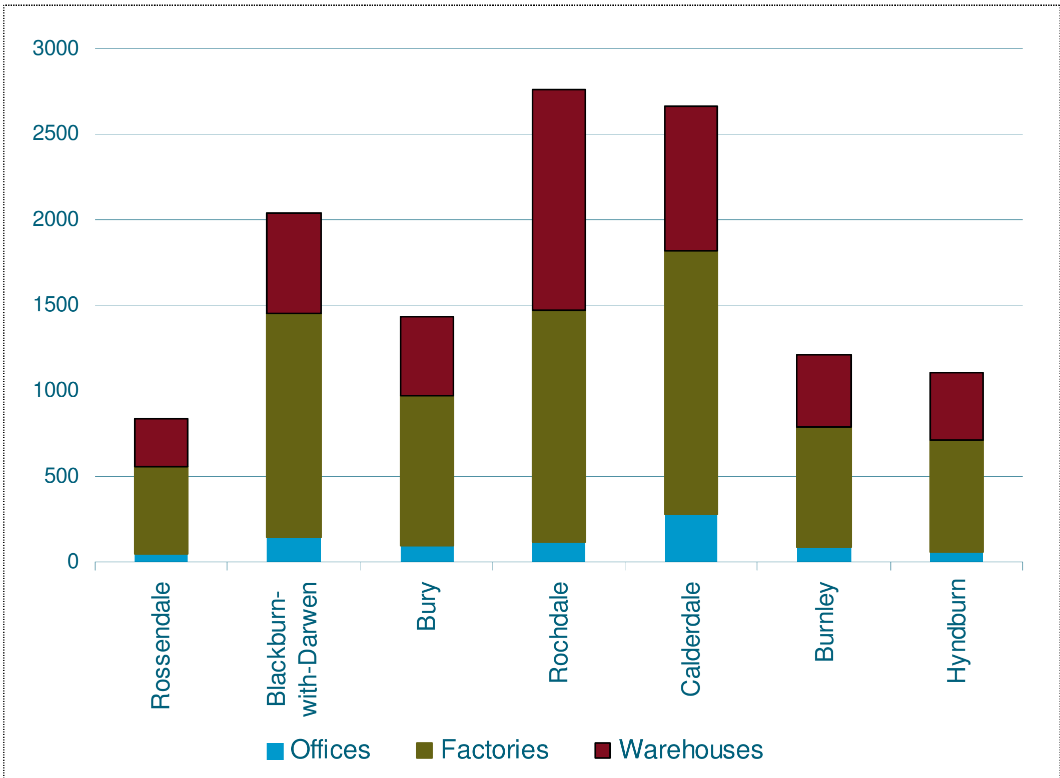


Source: Nomis/VOA, 2007

[12] Measures total amount of floorspace against the average amount of B1 floorspace per capita for each Borough
[14] It should be noted that some town centre offices are registered as being in Financial and Professional Services A2 use, specifically banks, building societies, estate agencies professional and financial services and betting offices. However, the Government Guidance requires ELRs to focus on B1, B2 and B8 land uses.

3.6 Figure 3.2 illustrates the relative proportions of different employment uses in Rossendale relative to surrounding Boroughs. Factory/manufacturing space dominates with over 62% of the total stock, reflecting Rossendale's mainly industrial focus. With reasonable strategic road access to the motorway network from the western parts of the Borough, warehousing/distribution space accounts for around a third of total space whilst offices only account for just over 5%[14].

Fig 3.2 Employment Floorspace by Type ('000 m2).



Source: ONS/VOA

3.7 An indication of the scale of change in the Borough's employment space between 2000-2007 is provided in Table 3.2 below.

Table 3.2 Change in Employment Floorspace, 2000-2007

District	Commercial Offices		Factories		Warehouses		Total	
	'000 m^2	%	'000 m^2	%	'000 m^2	%	'000 m^2	%
Rossendale	+13	38	-103	-17	+65	+31	-25	-3
Blackburn-with-Darwen	+47	47	-175	-12	+77	+15	-51	-2
Bury	+30	45	-223	-20	+29	+7	-164	-10
Rochdale	+18	19	-162	-11	+58	+5	-86	-3
Calderdale	+16	6	-321	-17	+51	+6	-254	-9
Burnley	+27	44	-186	-21	+99	+30	-60	-5
Hyndburn	+14	33	-42	-6	+46	+13	18	2

Source: Nomis/VOA, 2000/07 Note: includes purpose built and converted offices including central Government but not local government offices

3.8 These figures suggest the Borough had a net loss of some 25,000 m^2 of employment space between 2000 and 2007, equivalent to 3% of its total stock. This was a modest fall compared with surrounding Boroughs, all of which recorded net losses, except Hyndburn which had a small net gain. Rossendale recorded a relatively large proportional gain in office space (+38%) and sizeable loss of factory space (-17%) in common with nearby Boroughs. However, Rossendale recorded the largest proportionate gain in warehousing space over the period (+31%).

Emerging Supply of Employment Space

3.9 An indication of the amounts of new employment space in the development pipeline in Rossendale can be gauged from sites under construction and from unimplemented planning permissions. In April 2009, there was just 288 sq,m of floorspace under construction, which was for a joinery workshop. We also note that B&E Boys have recently delivered a 2,325 sq m office complex, as part of a mixed use development at 1 Whitehead Place, Rawtenstall (the former Higher Mill site).

3.10 If change of use applications from one B-class use to another are excluded, there was 10,794 sq.m of employment space in unimplemented permissions at 31 March 2009. This is only equivalent to just over a year's worth of completions at past rates. Most of this permitted space (79%) was for B1 uses, with 21% for B2 and less than 0.5% for B8 use.

3.11 The most significant permissions were:

- 3,021 sq m of offices at Blackburn Road, Rising Bridge, Haslingden.
- a 1,483 sq m printing facility at Croft End Mill;
- six small industrial units comprising 638 sq m in total at Spodden Mill;
- A B1 light industrial unit with ancillary retail space (470 sq m) at New Hall Hey Road;
- A 504 sq m B2/B1 unit (which also includes a retail element) at York Avenue, Haslingden; and
- A two storey 668 sq m training complex/office building at Imperial House, Kingsway off Holcombe Road.
- A 786 sq m B1/B2 Business/General Industrial Unit on Plot 3 at Futures Business Park, Bacup
- A planning permission for the erection of retail units at Rossendale Business Park (New Hall Hey) which is currently being implemented includes a condition requiring that within 18 months of occupation of Unit A1, not less than 1651 sq m of B1 floorspace shall be constructed and made available for occupation (LPA Ref: 2007/030).

Table 3.3 Unimplemented Permissions for Employment Space, 2009

Previous Use	Permitted Floorspace (sq m)
B1	8,520
B2	2,224
B8	50
All B uses	10,794

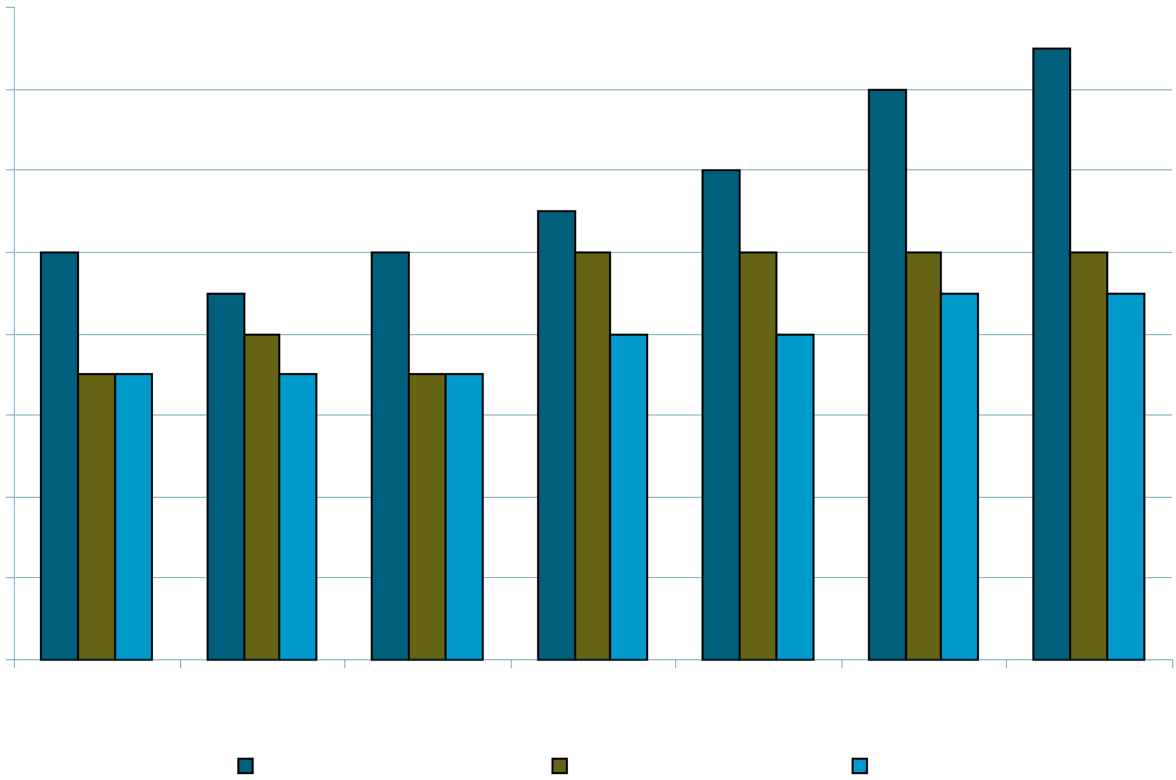
Source: Rossendale Borough Council

3.12 Overall, the relatively small amounts of floorspace under construction or with planning permission are indicative of the generally small scale of development in the Borough's commercial property market.

Property Availability/Vacancy Levels

3.13 Figure 3.3 indicates that vacancy levels of commercial property in Rossendale have consistently been higher than regional and national averages and have worsened in recent years. The latest published rate in 2004/05 was equivalent to 15% of the total stock of employment space, well above the 9/10% availability rate that is typical of a normal market with a reasonable amount of space available for firms to relocate and expand.

Fig 3.3 Vacancy Rates of Commercial Property (%).



Source: ONS/VOA

3.14 As Table 3.4 shows, Rossendale also has a higher level of vacancy than all surrounding Boroughs, most of which also have rates above the regional and national averages (10% and 9% respectively).

Table 3.4 Commercial Property Vacancy in Adjoining Boroughs, 2004/5.

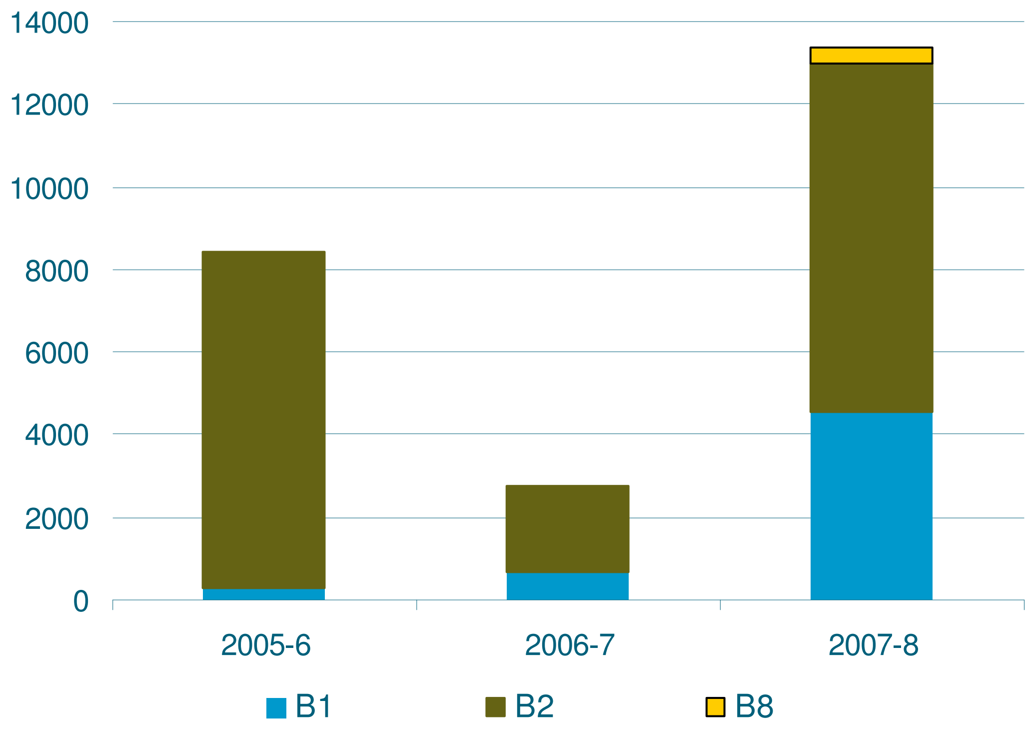
District	%
Rossendale	15
Blackburn-with-Darwen	11
Bury	8
Rochdale	11
Calderdale	12
Burnley	10
Hyndburn	17

Source: Nomis

3.15 Based on commercial property being marketed on national databases in late December 2008, there was around 5,450 sqm of industrial space available in the Borough, much of it on the Panda Industrial Estate, Waterfoot.[15] This was equivalent to just 0.4% of all industrial space in the Borough, a very low level. No office space was being advertised on national databases. However, reference to local marketing sources, specifically the 'Make It Lancashire' database, suggests that around 96 industrial units (relating to approx. 96,000 sqm) and 42 commercial office units (approx 6,665 sqm) were available as of 24 August 2009. Some 39,650 sqm of new industrial space has come onto the market in the three months prior to August 2009 compared to just 4,300 sqm coming off the market, reflecting the worsening market conditions (although perhaps surprisingly given the recession, whilst just 350 sqm of new office floorspace has come onto the market in the past three months, some 2,265 sqft had come off the market over the corresponding time period).

Development Rates

Fig 3.4 Gross Completions of Employment Space in Rossendale 2005 to 2008 (sq.m)

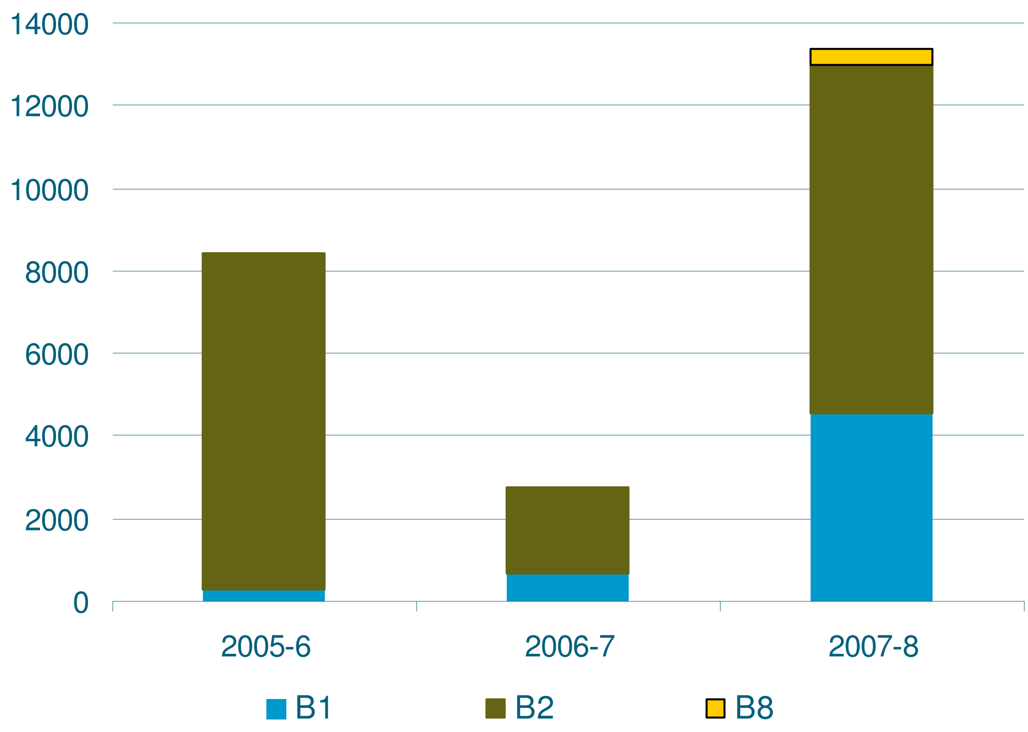


3.16 As illustrated by Figure 3.4, gross completions rates in Rossendale have varied over the last 3 years. In 2007/8, nearly 28,000 sqm of B-class space was developed compared with less than 2,800 m^2 in 2006/7. However, the 2007/8 figure included a very large completion at Madison Centre, Knowsley

[15] Based on properties being marketed through the Novaloca and Estates Gazette on-line databases

Road Industrial Estate comprising 14,550 sqm of B1 space which predominantly comprised the refurbishment of existing employment space. Gross completions were dominated by B2 space (76%) with a reasonable proportion of B1 space (22%) and a very small proportion of B8 (2%). Overall, the average gross completion rate was around 8,200 m^2 per annum.

Fig 3.5 Gross Completions of Employment Space in Rossendale 2005 to 2008 (m^2)



3.17 No split of B1 completions between office (B1(a)) and light industrial (B1(c)) use is available until the most recent monitoring year (2007-8). However, this shows that of the 5,350 m^2 of B1 space developed in that year, around 30% was developed for offices.

Losses of Employment Space

3.18 According to Rossendale Borough Council monitoring data, recorded losses of employment land in the period 2005–08 averaged approximately 8,900 m^2 of employment space lost per year, the majority of which was lost to residential use (5). While this reflects very high losses in one year, this average level of losses exceeds completions over the last 3 years and indicates a declining supply of employment space.

Table 3.5 Employment Land in Rossendale Lost to Other Uses, 2004-2007.

Previous Use	2005-6	2006-7	2007-8	Average p.a.
B1 (m^2)	N/A	183	0	183
B2 (m^2)	N/A	0	0	0
B8 (m^2)	N/A	1,256	648	952
All B Uses (m^2)	24,200*	1,439	1,014	8,884

Source: Rossendale Employment Land Monitoring.

*Note: This figure only includes land lost to residential uses. We have been advised that this figure is exceptionally high because a number of mills were converted or their sites redeveloped for residential development in 2005-6.

Age of Premises

3.19 A very broad indication of the age of the current stock is provided by Table 3.6. This suggests that much of Rossendale's employment space is dated, with the proportion built before 1970 (77%) being much higher than the regional average (59%). In addition, 70% of Rossendale's office space and 75% of its factory space was built before 1940 and there appears to be comparatively little modern space of all types. Much of the older factory space comprises disused mill buildings. For comparative purposes, whilst the proportion of Rossendale's commercial and industrial premises dating back to before World War II is similar to Pendle's (77%), it is considerably higher than places such as Calderdale (52%), Blackburn (45%), West Lancashire (10%), South Ribble (16%) and Hyndburn (49%).

Table 3.6 Age of Premises in Rossendale

Use	Pre-1940	1940-70	1971-80	1981-90	1991-00	2001+	Age Not Known
Offices	70%	13%	7%	N/A	N/A	N/A	N/A
Factories	75%	7%	5%	9%	3%	N/A	N/A
Warehouses	61%	5%	11%	12%	5%	N/A	N/A
All types	70%	7%	7%	9%	4%	1%	3%
North West Average	35%	24%	13%	10%	11%	3%	5%

Source: ODPM Planning Statistics 2005

Available Allocated Employment Land

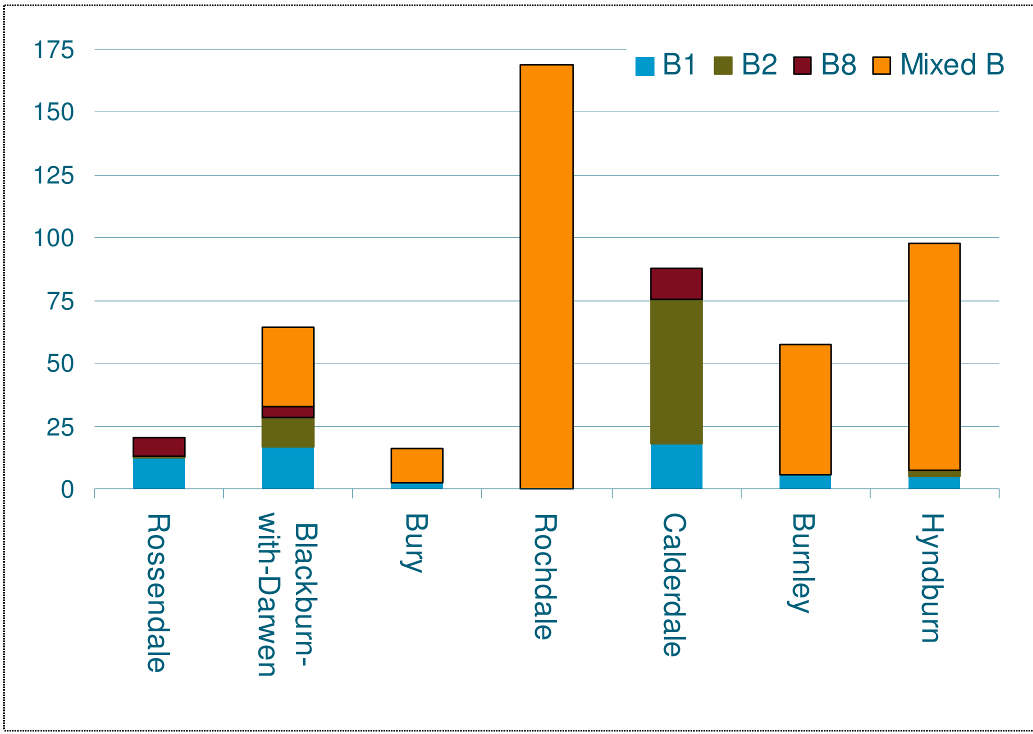
3.20 At April 2009 there was an estimated 17.75 ha of allocated employment land recorded as available for development in Rossendale. Some 33% (5.9 ha) of this supply comes from three plots at Newhallhey, Rawtenstall which have been earmarked for office use[16]. Other available sites include greenfield land at Baxenden Chemical Works, Rising Bridge (5.6 ha) which forms 31% of supply, and two plots at Barlow Bottoms, Whitworth comprising 3.5 ha, or 20% of total land supply.

Employment Space in Adjoining Areas

3.21 It is also important to understand the extent of available employment land in nearby Boroughs, and any major new economic developments coming forward there which might compete with Rossendale for future demand. Figure 3.5 summarises the amounts of developable employment land in Rossendale and some nearby Boroughs in the monitoring year 2007/8 (detailed figures are given at Table 18, Appendix 2). This shows that Rossendale has less available land than all other surrounding districts except for Bury. Rochdale, in particular, has a large quantity of available land, predominantly due to the strategic allocation of Kingsway Business Park, adjacent to the M62.

[16] Although the employment policies of the Local Plan have not been saved

Fig 3.6 Total amount of employment land available for industrial/commercial use.



Note: only includes sites over 0.4 ha in size

Source: 4NW 2007/8 Annual Monitoring Report and Calderdale Annual Monitoring Report 2006/7.

3.22 A brief review has also been undertaken below of the current position in each of the adjoining areas, and also within the Manchester Regional Centre which has a significant impact on commercial property markets across the region.

3.23 **Blackburn-with-Darwen** is situated to the west of Rossendale and contains the towns of Blackburn and Darwen which lie adjacent to the M65. Sites at junctions 4, 5 and 6 of the M65 are the main focus for future commercial development. A 27 ha area close to junction 6 covering the existing Furthergate, Greenbank and Whitebirk Industrial estates, and including land in neighbouring Hyndburn, has been designated as an employment zone where investment (including £7 million of European funding) will be focussed on improving the environment and encouraging business growth and inward investment, particularly in knowledge-based and high technology industries.

3.24 At junction 5, Evolution Park extends to around 11 ha and contains an incubation centre with around 4,000 m^2 of accommodation being completed. This park is also intended to attract high-technology and knowledge industries although the accommodation built could comprise either offices or light industrial space. Shadsworth Business Park (25 ha) has been recently completed but there is significant availability of high-quality modern business premises. Lower Darwen Paper Mill (3 ha) and Lower Eccleshill farm (5 ha) are currently undeveloped sites which have good motorway access and are available for general business (B1/2/8) development. The office market within the Borough is currently fairly small but is likely to be increased as a result of new provision in the 'cathedral quarter' development in Blackburn and the Freckleton Street Masterplan. The quantum of office space that may come forward as part of these schemes is currently unclear but the latter has been identified as a site with potential for both large and smaller scale office development. However, both of these schemes are still at land assembly stage and therefore the completion of useable space remains some time away.

3.25 **Bury** Metropolitan Borough lies to the south of Rossendale and on the northern edge of Manchester, to which it has strong economic and transport links. The Borough has excellent transport links, being the northern terminus for the Metrolink tram and with the Manchester ring road (the M60/M66) running through it. This high level of accessibility, as well as its low cost base and large local population, are the main attractions for business. The Borough has some 48 ha of available employment land on 44 separate sites. However, only 17 ha on 26 sites is immediately available with the remainder suffering from constraints to development, most commonly inadequate access[17]. The largest scheme with an extant permission is a mixed-use development at the former Elton Cop Dye Works on Walshaw Road, Bury which will provide eight office units of 3,512 m^2 in total. The largest allocated employment site in the adopted UDP[18] is the Council owned 'Bury Ground' (13 ha) which accounts for a third of all allocated and available employment land in the Borough and is located in a prominent position close to Bury Town Centre. It is primarily considered suitable for office and light industrial use although a new access road is required to enable development. Other important sites are Townside Fields, Bury (3 ha), to the south of the town centre, which is likely to accommodate B1 uses subject to overcoming existing access constraints. Park 66 at Pilsworth adjoins the M66 and is mostly developed for warehousing uses, although with some land remaining.

3.26 **Burnley** lies to the north of Rossendale and incorporates the main towns of Burnley and Padiham which lie in the M65 corridor, as well as a large area of Pennine moorland which is sparsely populated. The district was formerly heavily economically reliant on manufacturing and has a large number of older industrial premises alongside the Liverpool and Leeds canal. However, it also has some large, modern industrial estates such as Network 65 where around 8 ha of land has been developed since 2001, Shuttleworth Mead, Rossendale Road and Heasandford. The employment land supply largely consists of smaller sites up to 5 ha in size[19]. The major location for commercial offices within the Borough is in Burnley Town Centre, which contains a variety of converted and purpose-built premises, but there are no major new office sites.

[17] Bury Employment Land Availability Statement, April 2008
[18] Bury UDP Adopted August 1997, with policies saved by the Secretary of State 18 September 2007.
[19] Burnley Local Plan Burnley Local Plan Second Review adopted April 2006. All policies subsequently saved by the Secretary of State on 1 April 2009.

The largest employment development opportunity in the district is Hepworths, Pollard Moor in Padiham which is an 18 ha brownfield site requiring remediation, and identified as suitable for all employment uses (B1/2/8). Another major opportunity is at Stoneyholme (10 ha) which consists of depots and open space and has been identified for general business use (B1/2/8).

3.27 **Calderdale** is a large, predominantly rural district in West Yorkshire whose main settlements lie in the Calder valley running through the district from west to east. The western (upper valley) part of the district closest to Rossendale is very sparsely populated, but the eastern (lower valley) part includes the major towns of Halifax, Elland and Brighouse. This eastern area contains most of the existing and allocated employment sites and benefits from easy access to the M62 motorway. The Calderdale UDP[20] allocates over 115 ha of new employment land in the Borough of which around 100 ha remained undeveloped in April 2007. The most significant site is at Wakefield Road, Clifton where 25 ha of greenfield land is allocated for an office/business park development restricted to B1(a) and B1(b) uses. However, development is yet to start on this site. Around 3ha of land is allocated in the UDP at Todmorden, with a further 2ha at Hebden Bridge.

3.28 **Hyndburn** has a generally small and localised commercial property market[21]. Activity is concentrated along the M65 corridor and in the Borough's five main towns; Accrington, Oswaldtwistle, Clayton-le-Moors, Great Harwood and Rishton. The main existing and potential employment locations in Hyndburn are along the M65 and include;

- Whitebirk Industrial Estate – 35 ha of currently undeveloped land identified as a NWDA strategic site for regional investment;
- Altham Business Park and Industrial Estate (29 ha) – a major office and industrial location just off junction 8 of the M65 but with only 0.7 ha of land remaining;
- the former Huncoat Power station (22 ha) where permission has been obtained for the East Lancashire Waste Technology Park on 14 ha of the site;
- Clayton Business Park – a 30 ha fully developed industrial estate
- Junction 7 Industrial Estate – located just off the M65 in Clayton-le-Moors.

3.29 The employment premises offer within the towns is mostly former mill buildings, the majority of which are underused and have had little in the way of investment. This has resulted in the majority being broken up into smaller units providing low quality cheap accommodation. There is demand for small new units in or on the edge of the main towns with Hyndburn but there are very few available sites. Whilst low cost accommodation is readily available, this gives little incentive for developers to build new space. The office market is extremely small with very little stock, which is a similar position to Rossendale. In total there is 85 ha of employment land available within the Borough.

[20] Replacement Calderdale UDP : Adopted 25 August 2006. Policies saved by the Secretary of State in August 2009.
[21] Hyndburn Employment Land Study (February 2008): Lambert Smith Hampton

3.30 **Rochdale** lies to the south-east of Rossendale and contains four main towns - Rochdale, Heywood, Middleton and Littleborough. The majority of existing employment land is either within the town of Rochdale or close to the M62 which provides locational advantages for distribution firms. In general, the amount of office space within Rochdale and North Manchester more generally is low when compared with the Manchester city centre, South Manchester and Salford Quays markets. However, it is considered that demand for office accommodation in the town centre may increase if/when the Metrolink extension into it is complete, which could lead to a rise in rental values to a level where new development may occur[22]. Heywood Distribution Park (and Hareshill Business Park which lies adjacent to it) is the principal location for industrial/distribution uses within Rochdale and North Manchester. Located close to the M66 and M62, it currently contains over 170,000 m^2 of floorspace covering approximately 60 ha although levels of vacancy are high. In addition, there is around 13 ha of allocated but undeveloped land on the park and a further 13 ha on Hareshill Business Park. The Borough's largest employment development location is a regional strategic allocation known as the Kingsway Business Park which offers around 110 ha of land adjacent to the M62 and is due to be developed for a range of business uses over the next 10 -15 years.

3.31 **Manchester** City Centre contains the second largest concentration of office space in England and is also a regional centre for higher education, health, retailing and entertainment.[23] Within Greater Manchester as a whole there is over 4 million m^2 of office accommodation and a further 1 million m^2 had planning permission in 2006, most of it focussed in the city centre. [24] The largest employment area in the conurbation is Trafford Park which is a mixed employment area of over 450 ha which accommodates around 1,400 companies and 35,000 jobs, A current major development is the 81 ha mediacity:UK scheme which will house five BBC departments and other media-sector companies and is expected to generate around 10,000 jobs. Other major opportunity sites where future employment development will be focussed are Central Park in East Manchester, Woodhouse Park to the north of Manchester Airport, Manchester Business Park in Sharston and Birley Fields in Hulme. These have been identified as major sites for high technology industries.

Conclusions

3.32 Rossendale Borough currently has a low number of employment premises and a lower level of employment floorspace than neighbouring Boroughs, although this is partly due to its small population and a lack of major urban centres. Some 95% of its current stock is made up of manufacturing and warehousing premises with a very low proportion of office space, although this broad pattern is fairly typical for Boroughs in this area. The Borough contains a reasonable range of industrial sites and areas but very little in the way of office sites. The

[22] Rochdale Employment Land Study (July 2008): DTZ
[23] Manchester Unitary Development Plan (2006)
[24] Demand for Employment Land in Greater Manchester (May 2006): Arup for Manchester Enterprises

stock of employment premises is also very dated, particularly among factory and office premises.

3.33 In recent years, Rossendale has experienced a small net loss in employment floorspace, with large decreases in factory space only partially being offset by gains in offices and warehousing. This trend is similar to those in surrounding Boroughs, of whom only Hyndburn has recorded an increase in employment space since 2000.

3.34 There is around 10,794 m^2 of permitted employment floorspace in the development pipeline, the majority of which is B1 and B2 space. This only amounts to around one years supply at recent development rates. Much of this permitted space is provided in small sites or extensions to existing facilities and a few office sites.

3.35 There has been a moderate level of new employment space completed over the last 3 years, averaging almost 8,200 m^2 annually in gross terms, with the majority being B2 space. However, average losses of employment space, 8,900 m^2 per annum, exceeded gains of new space.

3.36 There are a number of development proposals in adjoining Boroughs and in the wider North West region, which have potential to compete with Rossendale for future employment development. In particular, the large strategic allocated sites close to the M62, such as Kingsway Business Park (some 15km to the south of Bacup by road), will provide a wide range of modern industrial and distribution premises of all sizes with excellent road access and which have the potential to attract or divert some existing businesses and future investment from Rossendale.

3.37 Furthermore, provision of sites aimed at higher technology sectors in Manchester and Blackburn and a strategic inward investment site in Hyndburn all provide for modern employment premises that are likely to compete with very limited provision of these types in Rossendale. The proximity of the large Manchester economy with its large supply of good quality office space and major industrial areas will also continue to act as a strong focus for any larger scale firms relocating to or within the region.

4.0 The Rossendale Commercial Property Market

4.1 This section describes current commercial property market[25] conditions in Rossendale Borough and the general area around it, including recent trends in demand for and supply of industrial and office premises, and the factors affecting these. These findings are based on discussions with a number of property agents and various economic development and business organisations active in the area. Unless specified otherwise, the views expressed in this chapter are those of the property agents and other stakeholders consulted at the early stages of the study, and these views inform the judgements made by NLP in subsequent chapters.

Overview

4.2 The Rossendale commercial property market is fairly localised. It mainly comprises the Borough of Rossendale, although there is some overlap with Greater Manchester and parts of the wider Pennine Lancashire sub-regional market, in particular Hyndburn and Burnley.

4.3 Rossendale's main attractions for firms are its relatively low cost land and rents compared with other parts of Pennine Lancashire and particularly Greater Manchester; its reasonable links to the M65 and M66 motorways, particularly around Rawtenstall and to the west of the Borough; and low wage costs. Perceived drawbacks include a relatively unattractive image (due, in part, to its increased remoteness and manufacturing legacy); poor public transport connections; the remote location of eastern parts of the Borough; and, its limited skilled labour supply.

4.4 Rawtenstall and the A56 / M66 corridor are the main foci of employment development within Rossendale. Rawtenstall, Haslingden, Bacup and Whitworth, have developed as industrial towns around the traditional textile and footwear industries (and to a lesser extent mining and quarrying). The Borough continues to have a reasonable manufacturing base despite the significant decline of footwear and textile industries in recent years. The Borough has never developed a strong office sector.

Market Perceptions of Rossendale

4.5 Perceptions of Rossendale as a business location have been obtained from interviews with property agents, developer and stakeholder consultations.

4.6 In the context of the sub-regional Pennine Lancashire market, discussions with key stakeholders indicate that Rossendale is unable to compete with the prime locations around the M65 corridor, where modern premises are available with excellent transport connections. Poor infrastructure and transport links and a

[25] i.e. the market for office, industrial and warehousing premises

general perception of remoteness, particularly to the east of the Borough also influence the market perception of Rossendale. Overall, there is a suggestion that the Borough's image and general perceptions of the area would have to be improved if more businesses are to locate or invest in the area. This is recognised in the Pennine Lancashire Integrated Economic Strategy (2009-2020) which recognises the clear need to address the image and quality of place to make Pennine Lancashire as a whole a natural place for new investment.

4.7 Within Rossendale, the A56 / M66 corridor emerged as the most favoured business location, followed by other sites within Rawtenstall and Haslingden that benefit from good road access. There is a perception by stakeholders that the market to the west of the Borough is more buoyant than areas to the east of the Borough. Whitworth is perceived as being remote from the rest of Rossendale and is considered to be more closely linked to economic activity in Rochdale, given its location and road links.

4.8 The majority of interviewees considered improved transport links / infrastructure and availability of good, accessible sites would significantly help Rossendale become a more attractive business location in the future. There is also a view that some intervention is necessary to bring forward land for development and attract occupiers if the Borough is going to be able to compete with adjoining areas.

Industrial Supply / Demand

4.9 Most demand for employment space in the Rossendale area is for industrial premises (which includes both manufacturing and distribution uses), levels of demand had been strong and steady for a number of years prior to the current economic downturn. Existing industrial estates tend to be used for a mix of manufacturing, small scale storage and distribution, and light industrial uses. The historical predominance of manufacturing industries in the Borough has left a legacy of mill buildings and old industrial sites, particularly on the Rawtenstall to Bacup corridor, which are unable to meet modern requirements and are underused or redundant.

4.10 In broad terms, the demand for industrial space in Rossendale is strongest close to the M66 / A56 corridor and to the west of the Borough in Rawtenstall and Haslingden. There are many existing businesses in Bacup, Waterfoot / Stacksteads and Whitworth although demand in these areas is more limited.

4.11 Feedback from property agents active in the area indicates that the greatest demand is for smaller industrial units, with healthy demand for those under 464 sq m (5000 sq ft), particularly units between 94 sq m – 279 sq m (1000 – 3000 sq ft); reasonable demand for units up to between 464 - 929 sq m (5,000 - 10,000 sq. ft); with more limited demand above 929 sq m (10,000 sq. ft). This demand pattern to some extent reflects the existing supply in the Borough, as existing sites lend themselves best to the provision of smaller units. Several local agents, however, are of the view that there is unmet demand in the area for high quality units between 94 sq m – 279 sq m (1000 – 3000 sq ft).

4.12 The lack of large level sites in Rossendale means that it is difficult to accommodate large-scale distribution activities within the Borough. Topographical issues are compounded by limited access to the strategic road network, particularly to the east of the Borough. In general terms, stakeholders advised that demand for large scale distribution uses is being met by existing and emerging industrial parks in close proximity to the M65 corridor (in the neighbouring Boroughs of Blackburn with Darwen, Hyndburn and Burnley). Rossendale's main attraction for distribution activities is for small scale operations seeking lower cost sites. In the longer-term, the market view is that Rossendale has only limited potential to attract footloose occupiers due to the lack of available sites currently and the limited potential to assemble large, level sites that can accommodate large distribution activities and attract investment in this sector.

4.13 In terms of supply of industrial premises, modern, good quality industrial space in Rossendale is limited, with much of the Borough's stock being reasonably old, particularly to the east of the Borough in Bacup and Waterfoot / Stacksteads. The older, more basic stock is cheaper and is attractive to some more traditional businesses operating in a local market. In general terms, the more modern industrial premises are located in the areas of greatest demand (i.e. adjacent to the A56 / M66 corridor and in and around Rawtenstall).

Office Supply / Demand

4.14 Rossendale is not generally regarded as a significant location for office development[26]. According to agents, this is partly due to a perception that it is predominantly an industrial area with a less attractive image than more established regional and sub-regional office locations in the surrounding area, particularly along the M65 corridor, but also reflecting its overall lack of modern office premises.

4.15 The office market in Rossendale is predominantly focussed around Rawtenstall Town Centre, which is the administrative centre for the Borough, and the A56 / M66 corridor due to good road links. Agents advise that demand for office accommodation in Haslingden, Bacup and Whitworth town centres is less strong and generally limited to serving local requirements. The greatest demand for office accommodation is for small units under 94 sq m (1000 sq ft).

[26] Airtours were formerly based in Rossendale prior to their relocation to Rochdale.

4.16 This is supported by the conclusions of the Lancashire Town Centres Offices Study[27], which states that:

'The western part of the borough is expected to continue to be the focus for both supply and demand because of its superior accessibility. Topography, which limits development to the valley floor, and the restricted road network in the east of the borough, will continue to constrain interest, and thus supply.'

4.17 The current supply of office space in Rossendale is limited and generally less in terms of overall stock than in surrounding parts of Pennine Lancashire and Greater Manchester. The existing stock comprises a mix of modern premises (largely focussed around the M66 / A56 corridor at Link 665, Carrs Industrial Estate, and Knowsley Road Industrial Estate); refurbished mills; dated purpose-built office accommodation; and, office premises above shops in the town centres. Much of the recent supply in office space (i.e. over the last five years) has been through refurbishments and conversions, with the exception of Futures Park at Bacup. Much of the supply consists of small office premises in the town centres, which are orientated towards local needs. Agents advise that in general terms, the market for office space is non-corporate and comes from the public and service sectors.

4.18 In general terms, there has been very little new office development in Rossendale. B&E Boys has secured planning permission for a 2325 sq m office complex, as part of a mixed use development at 1 Whitehead Place, Rawtenstall (the former Higher Mill site). This is currently under construction. There is also an extant planning permission for a range of office accommodation at Rossendale Business Park (New Hall Hey), although it is currently unclear whether this will be implemented or not.

4.19 Planning permission has recently been granted for new pavilion style offices (i.e. Rising Bridge Enterprise Village) providing 3021 sq m of accommodation through nine units at Blackburn Road, Haslingden. The scheme will be part funded by Lancashire County Developments Ltd. Ground remediation works have started.

4.20 In general terms, the more modern, high quality office accommodation is located in Rawtenstall and around the A56 / M66 corridor. Some small, good quality office accommodation is provided at Futures Park in Bacup, but this is not a prime office location. Additional land, which has been marketed for office and research and development is available at Futures Park but no end users have been secured.

4.21 In terms of tenures, there is very little freehold provision available in Rossendale, apart from small scale conversions in the town centre, much of which fails to fulfil modern requirements and does not benefit from convenient

[27] BE Group (April 2008): *Lancashire Town Centre Offices Study*

car parking provision. The Rossendale market is currently almost entirely served by multi-tenanted leasehold opportunities.

4.22 In terms of future requirements, there may be some potential demand for local businesses seeking more modern accommodation, although in general terms Rossendale currently lacks any significant base of existing office-based firms. Historically, the Rossendale market has been almost entirely served by multi-tenanted rental opportunities. Agents consider that there is some pent up demand in these multi tenanted situations for high quality, small scale accommodation with its own front door. If this demand is not met in accessible locations in Rossendale, there is a risk that some of these firms relocate elsewhere. Some of this demand will be met by the Rising Bridge Enterprise Village development. This scheme is intended to help address a perceived gap in the market for 'own front door' properties that can be purchased or rented. There is potential for this scheme to attract occupiers from Hyndburn and Burnley. Support for this was drawn from Cassons Accountants' move to Carrs Industrial Estate from Burnley Town Centre.

4.23 Demand arising from major relocations of firms from elsewhere, including public sector relocations was considered unlikely. These types of occupiers are more likely to consider locations with better strategic access. Rossendale Borough Council is currently reviewing options for new office accommodation however. This may be within Rawtenstall Town Centre although no firm decision has been made on its form or precise location.

Rent Levels

4.24 Property rents for industrial premises in Rossendale are generally slightly lower than those in Blackburn with Darwen and Burnley; and, significantly lower than industrial rents in Manchester. Within Rossendale, rent levels in Rawtenstall and the A56 / M66 corridor are generally higher than those in Bacup and Whitworth, reflecting their remoteness and the poor quality of the existing stock.

4.25 It is understood from agents active in the area that rental levels vary significantly in Rossendale. Typical rental levels have been reported to be from approximately £10.75 - £16 sq m for industrial accommodation within former mill buildings and within older premises; between £35 – 37.50 sq m for warehousing and distribution accommodation; to maximum levels of between £43 - £55.50 per sq m for good quality new build accommodation around the A56 / M66 corridor.

4.26 There is significant variation in rental levels across the office market in Rossendale, ranging from approximately £64.50 sq m in premises in Bacup and to the east of the Borough to between £107.50 - £135 sq m in Rawtenstall and around the A56 / M66 corridor. Agents reported that there is no market for accommodation over £135 sq m.

4.27 In general terms, Rossendale Borough appears a reasonably competitive location in cost terms, compared with other areas in Pennine Lancashire and particularly compared with Manchester. However, lower rents have to be balanced against the locational disadvantages and lack of infrastructure in the Borough and they are a clear indication of lower demand and the quality/age of premises available.

Investment Interest

4.28 Consultations with local property agents indicate that due to location, topography and a lack of suitable, large sites for employment development, Rossendale is unlikely to be able to secure significant levels of inward investment. Investment in Rossendale is likely to continue to be small scale and driven largely by indigenous businesses. There is some evidence that small scale inward investment could be drawn from Burnley and Hyndburn, if the right product is delivered. Agents have commented that the Rising Bridge Enterprise Village development could potentially secure some investment from these areas.

4.29 Agents report that the majority of enquiries for industrial premises are for units under 464 sq m (5000 sq ft), and in particular for units between 94 sq m – 279 sq m (1000 – 3000 sq ft). For office accommodation, the greatest number of enquiries is for small units under 94 sq m (1000 sq ft).

Needs of Local Businesses

4.30 The potential scale of future employment space needs of local businesses was examined through consultations with local property agents and key stakeholders including the NWDA, Business Link, Lancashire County Developments Ltd (LCDL), local Chambers of Trade, and Lancashire Economic Partnership.

4.31 The main points that emerged from the consultation exercise are that many firms have historic ties with Rossendale or their owners lived nearby, many being long-established, and relatively tied to the Borough by staff retention factors and the high costs of relocation.

4.32 The Borough has had some success in attracting new companies and retaining relocating firms that were already in Rossendale. Business start ups are understood to be slightly higher than the national average. However, as is the case throughout East Lancashire, the survival rate in Rossendale is low[28] and it is the view of several of the commercial agents (and supported by the NWDA) that the quality of new business start ups tends to be relatively poor.

4.33 The shortage of accessible, high quality accommodation in Rossendale is identified by stakeholders as a particular problem facing local businesses. In

[28] By the end of 2005, 68% of new businesses formed in Rossendale District three years earlier were still trading, compared with 73% for Lancashire as a whole and 71% for the North West region

the past, we understand that the lack of suitable accommodation to meet modern requirements has led to some businesses relocating to other areas. Until the recent recession, the tenure of accommodation in Rossendale has been an issue. In particular, the high proportion of leasehold accommodation that is available has been an issue for local businesses looking for freehold accommodation. This has changed in recent months due to the current economic climate although it is thought that the demand for freehold accommodation will return.

Property Availability / Vacancy

4.34 For industrial and office premises, our survey of sites, property websites and discussions with agents confirmed reasonably low vacancy levels in new, well located areas such as Carrs Industrial Estate.

4.35 However, the older stock within the Borough is more susceptible to vacancy and repair issues, resulting in the high overall vacancy rate discussed in Section 3.0. Most stakeholders consider there to be a surplus of poor quality stock, in particular mill style industrial and office accommodation in Bacup and Whitworth to the east of the Borough. Many of these premises are only occupied at ground floor level with vacant or underused space to the upper floors. Notwithstanding this, there are successful businesses operating from these types of premises, particularly those that do not require modern facilities.

4.36 A vacant property strategy is currently being prepared. The document is in its initial stages at the moment but the emphasis is on a holistic approach to reducing the number of vacant properties in the Borough. This will be achieved by an inter-departmental approach and will enable the council to maximise its resources to intervene when a property is causing blight to an area. It will include both residential and commercial buildings and will include a place making approach to improve neighbourhoods. Incentives may include support to owners, improve the environment, work with RSL to market and rent the property, business start ups and use of legislation.

4.37 Some grant assistance is available, to both existing and new businesses, towards the capital costs of refurbishing vacant commercial properties. These grants are generally up to a maximum of £20,000, unless an exceptional case can be made (for example where the business can demonstrate the continued provision of a significant number of jobs within the Borough or the significant employment of local residents and/or the use of local contractors). The scheme is initially funded until March 2011 and is open to applications until that time (subject to funding remaining available within the scheme).

Start-up Space

4.38 The view of agents is that there is a lack of high quality, small office and industrial units available as start-up space for new businesses. Agents also commented that, whilst Kingfisher Consultants (who provide office accommodation in Rawtenstall and at Futures Park in Bacup) provide some support to young and growing businesses, more could be done to help start-up businesses. Agents commented that some of the former mill buildings to the east of the Borough provide low cost accommodation that functions as start-up space.

4.39 In general terms, there is very little accommodation for knowledge based, higher technology firms in Rossendale. Whilst there has been attempts made to secure high technology, knowledge based industries, these have largely been unsuccessful to date.

Gaps in the Property Portfolio

4.40 The general market view is that there is a shortage of industrial and commercial property of all sizes in attractive locations in the Borough, most notably in Rawtenstall and Haslingden and around the A56 / M66 corridor. In particular, the main gap identified is for small industrial and office space. In respect of office demand, some of this will be met by the Rising Bridge Enterprise Village development. However, there is still a market view that demand exists for an office village close to Rawtenstall, which offers a different product from the multi tenanted, multi-storey business centres. This could be met (to an extent) by the Whitehead Place office complex that is under construction on the former Higher Mill site in Rawtenstall, or, potentially, the site with extant planning permission a range of office accommodation at Rossendale Business Park (New Hall Hey), although it is unclear whether this will be implemented.

4.41 Further to the above, agents reported that until recently, there had been a shortage, albeit to a lesser extent, of larger ‘grow on’ accommodation (over 930 sq m / 10,000 sq ft) around the A56 / M66 corridor. However demand for this has dropped sharply in recent months due to the economic recession.

Potential Future Growth

4.42 In terms of a likely future economic role for Rossendale and the scale of demand for commercial space in it, market views are mixed. There are strong views that Rossendale should focus on its existing strengths, such as the local industrial and engineering sectors, and nurture existing companies as far as possible by catering for current and emerging requirements. At the same time, there is a need to achieve a more diverse economic base. Some cited the potential for moving some industrial sectors into higher-value activities by promoting linkages with knowledge-based / research and development (R&D) activities, although the scope to do this is felt to be limited, given the lack of higher education representation, the lack of skills in the Borough, and the lack of existing facilities to link in with. Notwithstanding this there is a general view, shared by the NWDA, that the increased provision of smaller, flexible units, with good broadband facilities could attract some small creative industries.

4.43 Some demand for both industrial and office space will emerge from indigenous growth, with a range of support industries needed to underpin housing and population growth. This was seen as more probable than large industrial or office firms moving from elsewhere, unless a large new allocation can be found in an accessible location that could attract investment from other areas. Flexible provision needs to be made for 'move on' accommodation to meet their changing requirements to ensure that these businesses are retained within the Borough.

4.44 The topography and lack of large, level sites and the accessibility issues facing areas to the east of the Borough mean that the opportunities to attract large warehousing and distribution companies are limited. The market view is that infrastructure constraints could actually result in a decline in B8 space in the Borough.

4.45 Some stakeholders consider that there is potential to develop leisure, culture and tourism to provide outdoor leisure activities for Greater Manchester residents who do not want to travel to the Lake District or Snowdonia. Rossendale BC has commissioned a study to examine the viability of maximising the Borough's tourism offer and any associated economic benefits.

Quality of Current Provision

4.46 It was recognised that some older industrial estates have reached or are approaching the end of their economic life or are unsuited to modern industrial needs and may have potential for redevelopment to modern employment premises, and some to other uses. This is particularly true in the Rawtenstall to Bacup corridor and at Whitworth. Stakeholders consider that low rent levels mean that there is often little incentive to significantly upgrade older industrial units, and in some cases building new bespoke units where land is available can be as cost effective for firms.

4.47 According to stakeholders, there is, however, some potential for older industrial buildings to be refurbished or sub-divided for industrial use, accompanied by targeted redevelopment of older individual units. This is most likely to occur in established locations such as Haslingden and Rawtenstall where demand is strongest, although recent new build opportunities have conspired to make the replacement or renewal of older premises less commercially attractive. The constrained land supply and empty property rates may encourage more investment in the existing building stock, but at the risk that firms look outside of the Borough to meet their future needs.

4.48 There are, however, a number of programmes operating in the Borough seeking to address economic under performance through the improvement of existing employment premises. This includes the Pennine Lancashire Integrated Economic Strategy (2009-2020) which features amongst its key objectives the aspiration to develop economic and business infrastructure to encourage innovation, re-investment and new investment.

Competition

4.49 While there are a number of major developments planned or underway in surrounding areas, in general terms, these are likely to serve a different market to businesses in Rossendale. In particular, there are employment developments and commitments in Blackburn, Bury, Rochdale and Hyndburn (for example Kingsway Park, Rochdale as well as Network 65, Empire Business Park and Burnley Bridge Business Park, Burnley) although the majority of this space will targeted at larger scale distribution operators, looking for a strategic location, and is unlikely to compete directly with existing or future businesses in Rossendale.

4.50 In terms of Rossendale's traditional strengths as an industrial location, stakeholders consider that some competition arises from surrounding areas although these are generally more expensive than comparable sites in Rossendale.

4.51 As Rossendale has not been a significant office location in the past, the areas likely to compete with it for office development are less clear. It is unlikely to compete with the larger, higher quality office space in central Manchester. Even with the advantage of lower rents, Rossendale may have some difficulty competing with other Pennine Lancashire locations until it establishes a clearer and more attractive image as an office location. There is, however, evidence that some businesses can be attracted from areas such as Burnley and Hyndburn, if the right product is delivered (i.e. Cassons Accountants' move to Carrs Industrial Estate from Burnley Town Centre).

4.52 We understand that there is an existing commitment at Whitebirk, Hyndburn which is a strategic site adjacent to the M65 motorway targeted at small scale, advanced manufacturing and digital media companies. This site is well connected to the motorway network and could potentially undermine the prospects of securing similar uses in Rossendale.

Conclusions

4.53 The Rossendale property market is fairly localised although there is some overlap with Greater Manchester and parts of the wider Pennine Lancashire sub region. The Borough does benefit from relatively low cost accommodation compared with surrounding areas. Business perceptions of the Borough are generally, however, fairly poor.

4.54 The A56 / M66 corridor and accessible locations around Rawtenstall and Haslingden is where demand for employment space is greatest, and where the better quality accommodation is located in general terms. There is a significant amount of older stock in Rossendale, particularly in the Rawtenstall to Bacup corridor and Whitworth, which no longer meets modern requirements.

4.55 The Borough continues to have a reasonably strong manufacturing base (particularly in sectors such as food and drink; textiles and clothing; and rubber and plastics), despite a decline in traditional industries, and demand for industrial premises remained reasonably strong until the recent downturn. Rossendale is not generally regarded as a significant office location and has a limited office supply. The office market in Rossendale is predominantly focussed around Rawtenstall and the A56 / M66 corridor due to good road links and support infrastructure.

4.56 A gap in provision has been identified for small scale, modern office and industrial units, which offer an alternative from the multi-tenanted stock that has historically dominated the market in Rossendale. A lack of good quality grow-on accommodation for existing local businesses has also been identified although the demand for this recently has fallen off due to the economic recession.

4.57 In terms of future growth, discussions with commercial property agents indicates that demand for both industrial and office space will emerge from indigenous growth in the area as opposed to inward investment. There is further potential to attract some occupiers from Hyndburn and Burnley, subject to the delivery of good quality accommodation in good locations in Rawtenstall and the A56 / M66 corridor. Some potential is perceived by the market for an increase in small scale hi-tech and creative industries, potentially in the Rawtenstall to Waterfoot corridor.

4.58 Due to the topography of Rossendale and current infrastructure constraints, there is considered to be only limited potential to identify new employment sites for development, particularly in areas where demand for space is greatest. In the light of this, the general market view is that better use must be made of existing sites in order to support future growth.

5.0 Review of Current Employment Sites and Allocations

Introduction

5.1 NLP has undertaken a site visit of a total of 94 developed, allocated and option employment sites amounting to 297.46 hectares in total area. The list of sites assessed was agreed with the LPA. Locations of these sites are shown in plans provided at Appendix 3.

5.2 The sites assessed as part of the study are classified as either:

(a) **Existing Sites** – These are existing employment areas (the majority of which are the designated employment areas identified by the Local Plan) and sites under construction

(b) **Committed Sites** - These are Local Plan employment allocations and sites with extant planning permission for employment development

(c) **Option Sites** – These are potential (further) sites for economic development which are considered in terms of their possible potential future contribution.

5.3 Sites under a and b above are considered within this section which assesses the characteristics and quality of provision of existing and committed employment sites within the Borough and assesses their suitability to meet future employment development needs. Sites under c (option sites i.e. potential, future employment sites) are the focus of Chapter 9 of this study.

5.4 Table 5.1 identifies the classification of all sites (existing, committed and option).

Table 5.1 Classification of sites

Location	Ref.	Site	Classification
A56/M66 Corridor			
	CFS12	Land at Grane Road/Holcombe Road	Option
	CFS52	Gas Street, Helmshore	Option
	CFS122	Hutch Bank Quarry	Option
	CFS88	Touch and Take Farm, Haslingden	Option
	E1	Land adjacent to Baxenden Chemicals, Haslingden	Committed
	E2	Newlock, Haslingden	Committed

Location	Ref.	Site	Classification
	E3	Reel Vision, Commerce Street, Haslingden	Existing (with small area committed)
	E4	Holden Vale, Helmshore	Existing (with one plot committed)
	E5	Knowsley Road Industrial Estate Site B	Existing
	E6	Broadway, Haslingden	Existing
	E19	Hollands Pies & Puddings	Existing
	E20	Hud Hey Industrial Park	Existing
	E21	Rossendale Plastics Ltd	Existing
	E22	Warton	Existing
	E23	Prinny Hill/Elekem, Haslingden	Existing
	E24	The Courtyard, Grane Road	Existing
	E25	St Crispin Way Industrial Estate	Existing
	E26	Todd Hall Road Industrial Estate	Existing
	E27	Waterside Business Park	Existing
	E28	Tesco Store, Haslingden	Excluded from assessment - developed
	E29	Knowsley Road Industrial Estate Site A	Existing
	E30	Musbury Fabrics, Helmshore	Existing
	E31	Mayfield Chicks, Helmshore	Existing
	E32	Voith Paper Fabrics/TNT Deliveries	Existing
	E33	Croft End Mill, Edenfield	Existing /Committed
	E34	Georgia Pacific	Existing
	E35	Cuba Industrial Estate	Existing
	E36	Industrial estate, Edenfield	Existing
	E53	Knowsley Road Industrial Estate Site C	Existing (with one plot committed)
	E81	Land adjacent to Rising Bridge Inn, Blackburn Road	Committed
	E82	Edward Street, Haslingden	Option

Location	Ref.	Site	Classification
	E83	Land rear of Manchester Road Service Station, Haslingden	Option
Rawtenstall			
	CFS26	Land at Fallbarn Crescent, Rawtenstall	Option
	CFS51	Land off Bocholt Way, Rawtenstall	Option
	CFS82	Site 1B, Former Groundwork, New Hall Hey	Option
	CFS86	Site 7a Former Groundwork, New Hall Hey	Option
	E7	Site under construction, Rossendale Business Park	Committed
	E9	Riverside Works South	Existing
	E10	Asda Store, Rawtenstall	Excluded from assessment - developed
	E11	Paddock, Cloughfold	Committed
	E37	Riverside Works North	Existing
	E38	Novaks Bridalwear/JB Broadleys, Reedsholme	Existing
	E39	Riverside Business Park	Existing
	E40	Hardmans Business Centre	Existing
	E41	Units on New Hall Hey Road	Existing (with one plot committed)
	E42	Ilex Mill and Rawtenstall Bus Station	Excluded from assessment - developed
	E43	Lamberts, Fallbarn	Existing
	E44	Jacobson Footwear, Cloughfold	Existing
	E51	Kingfisher Centre, Burnley Road	Existing
	E75	Rossendale General Hospital	Option
	E88	Rossendale Motorshow	Existing
	E89	Land between East Lancs Railway and River Irwell, Rawtenstall	Option
	E90	Former Accrington and Rossendale College	Option
	E91	Kenross Containers, Kippax Mill	Existing
	E92	Whitehead Place, Rawtenstall	Existing

Location	Ref.	Site	Classification
	E93	St Mary's Chambers	Existing
	E94	Valley Centre	Existing
Bacup/ Waterfoot/ Stacksteads			
	CFS35	Recreation Ground, Stacksteads	Option
	CFS77	Sports pitches, Stacksteads	Option
	E12	B & E Boys Yard, Waterfoot	Existing
	E13	Parks Road Industrial Estate, Bacup	Existing (with one plot committed)
	E45	Industrial units at Highfield Road, Hareholme	Existing
	E46	Warth Lane Industrial Estate	Existing
	E47	Lambert Howarth Distribution Centre, Whitewell Bottom	Existing
	E48	Albion Mill, Waterfoot	Existing
	E49	Vacant Joshua Hoyles Textiles Warehouse, Waterfoot	Existing
	E50	Hugh Business Park, Waterfoot	Existing
	E54	Kearns Mill, Waterfoot	Existing
	E63	Lancashire Sock Factory, Bacup	Existing
	E64	New Line Industrial Estate	Existing
	E65	Suttons, Bacup	Existing
	E66	Beech Industrial Estate, Bacup	Existing
	E67	Meadow Mill, Bacup	Existing
	E68	Broadclough Mill, Bacup	Existing
	E69	Futures Park, Bacup	Part existing, part committed and part option
	E70	Mill on Farholme Lane, Stacksteads	Existing
	E71	Blackwood Road, Stacksteads	Existing
	E72	Bacup Shoe Factory, Stacksteads	Existing
	E73	Shadlock, Newchurch Road, Stacksteads	Existing

Location	Ref.	Site	Classification
	E74	Land Adjacent to Bacup Leisure Hall, Bacup	Option
	E78	Former Norweb Power Station, Stacksteads	Option
Whitworth/ Facit			
	E14	Barlow Bottoms, Whitworth	Committed
	E15	Samba Studio, Facit	Existing
	E52	Fudge Factory, Facit	Existing
	E55	Albert Mill/Sunnyside Works, Market Street	Existing
	E56	Orama Mill, Cowm Park Way	Existing
	E57	Brookside Mill, Whitworth	Existing
	E58	Daniel Street Industrial Estate, Whitworth	Existing
	E59	Facit Mill, Facit	Existing
	E60	Kennedy Transmission, Station Road, Facit	Existing and committed
	E61	Slingco, Cowm Park Way North, Facit	Existing
	E62	Units off Market Street, Shawforth	Existing
	E86	Land at Cowm Park Way South Whitworth	Option
	E87	Disused quarry, Facit	Option

5.5 An assessment was made of each site's suitability for employment uses, against the ten criteria listed below, which reflect those in ODPM Guidance on Employment Land Reviews (2004):

- Strategic road access;
- local road access;
- Accessibility to public transport;
- Accessibility to services and labour;
- Adjoining uses;
- Site size and development/planning constraints;
- General attractiveness of the location;
- Vacancy levels;
- Attractiveness to the market; and
- Planning constraints.

5.6 A site appraisal sheet was completed for each site which described the employment site/area and provided a comment and score between 1 (worst) and 5 (best) for each of the ten criteria assessed. Each site was therefore scored out a maximum possible score of 50. The site appraisal sheets form Appendix 4 to this report.

5.7 The individual site assessments were then drawn together, with the scoring system used to rank the sites as of good, medium or poor overall quality and attractiveness. Tables separately ranking the existing and committed sites are provided below.

5.8 The following sections consider the sites in the Borough's main geographical locations of (1) A56/M66 Corridor, (2) Rawtenstall, (3) Bacup/Waterfoot/ Stacksteads and (4) Whitworth/Facit. Existing, allocated and option sites are considered separately.

Overview of Sites

5.9 A total of 94 sites were assessed as part of this study, which include existing employment areas, committed allocations in the Local Plan (albeit the relevant policies have not been saved), extant planning permissions for employment development and other potential development sites.

5.10 Three allocated employment sites have been excluded because they have been released for alternative uses. These are: -

- Ilex Mill and Rawtenstall Bus Station;
- Asda store, Rawtenstall; and
- Tesco store, Haslingden.

5.11 91 sites were therefore included within our assessment. Of these, 15 are J1 sites allocated in the Local Plan, 50 are J3 designated existing employment areas designated in the Local Plan and 26 are other identified sites.

5.12 The broad location of employment sites in the Borough assessed as part of this study is illustrated by Table 5.2. This indicates that the highest concentration of employment land lies within the A56/M66 corridor and the lowest in the eastern parts of the Borough.

Table 5.2 Broad location of assessed sites

Location	No. of sites	Total Site Area (ha)	% of total site area
A56/M66	31	134.00	47%
Rawtenstall	23	53.91	19%
Bacup/Waterfoot/ Stacksteads	24	62.06	22%
Whitworth	13	40.36	14%
Total	**91**	**287.46**	**100**

5.13 The type of development currently on the assessed sites is shown by Table 5.3, which shows that the majority of existing employment sites/areas assessed were general or low value industrial estates (low value industrial estates referring to sites with low cost levels and relatively low value products). Relatively few existing office sites were examined. A large number of sites assessed were currently undeveloped or not in employment use.

Table 5.3 Type of development on assessed sites

Type of Development	No. of sites	Total Site Area (ha)	% of total site area
Undeveloped / in informal recreational use	19	39.64	14
Not in employment use	7	83.54	29
General industry/distribution	30	78.95	27
Low value general industry/distribution	19	51.8	18
Offices/business park	7	16.75	6
Single occupier	4	11.07	4
Vacant employment building	5	5.71	2
Total	**91**	**287.46**	**100**

Existing employment areas

5.14 The following sections consider the sites/employment areas within the four sub-areas of A56/M66 Corridor, Rawtenstall, Bacup/Waterfoot/ Stacksteads and Whitworth/Facit. Tables ranking the supply of sites/employment areas assessed in each of these four areas are also provided. Existing employment sites/areas are considered first, followed by commitments.

A56/M66 Corridor

5.15 Many of the assessed sites/areas in the western part of Rossendale benefit from good access to the A56/M66 corridor. Together with sites/areas in Rawtenstall, these employment sites/areas benefit from some of the best strategic road connections in the Borough and this is one of the factors which causes many of the sites in this sub-area to score highly on our assessment and to be attractive to the market. Table 5.4 shows how all the assessed sites/areas in the A56/M66 corridor scored overall.

Table 5.4 A56/M66 Corridor Existing Sites/Areas

Ref.	Site/Area	Area	Score (out of 50)	Overall Rank
E25	St Crispin Way Industrial Estate	8.64	41	Good Quality
E5	Knowsley Road Industrial Estate Site B	3.29	40	
E6	Broadway, Haslingden	0.5	40	
E21	Rossendale Plastics Ltd	2.76	40	
E24	The Courtyard, Grane Road	0.65	39	
E53	Knowsley Road Industrial Estate Site C	6.96	38	
E26	Todd Hall Road Industrial Estate	4.51	38	
E19	Hollands Pies & Puddings	5.76	37	
E29	Knowsley Road Industrial Estate Site A	6.96	37	
E3	Reel Vision, Commerce Street, Haslingden	0.49	37	
E4	Holden Vale, Helmshore	3.7	36	
E1	Land adjacent to Baxenden Chemicals, Haslingden	5.63	36	
E27	Waterside Business Park	4.51	36	
E81	Land adjacent to Rising Bridge Inn, Blackburn Road	0.57	35	
E23	Prinny Hill/Elekem, Haslingden	0.31	34	Average Quality
E22	Warton	0.94	33	
E34	Georgia Pacific	4.37	32	
E32	Voith Paper Fabrics/TNT Deliveries	4.18	32	
E35	Cuba Industrial Estate	2.43	32	
E2	Newlock, Heslingden	3.43	31	
E20	Hud Hey Industrial Park	2.2	30	
E30	Musbury Fabrics, Helmshore	4.62	26	Poor Quality
E36	Industrial estate, Edenfield	0.91	25	
E31	Mayfield Chicks, Helmshore	3.27	25	
E33	Croft End Mill, Edenfield	0.59	25	

5.16 ***Stubbins/Edenfield***: Five existing employment sites/areas in the southwest of the Borough (Stubbins/Edenfield area) were assessed (E36, E32, E33, E34, E35). This general area benefits from excellent strategic road access as a result of its location close to the M66/A56 junction. However, despite these road links, the area is fairly rural in nature and is remote from services and major centres of population. All five sites/areas in this sub-area had medium-low scores overall. The sites were identified as suffering as a result of poor quality local roads and their remoteness from services/frequent public transport links. Vacancy rates varied according to the site. Some sites also had constraints to further development e.g. the presence of mature trees or a river within the site.

5.17 Of the five sites/areas in this sub-area assessed, site E32 (Voith Paper fabrics/TNT deliveries) and site E35 (Cuba Industrial Estate) scored best. This reflects the role of E32 and E35 as well established industrial areas with slightly higher profile/status occupiers than the other three sites and much lower vacancy rates.

5.18 Overall, site E36 was assessed as being ‘poor’ quality and sites E32, E34 and E35 were of average quality. E36 (Industrial Estate, Edenfield) which particularly caters for the motor sector scored poorly due to its fairly high vacancy levels, poor quality access and remoteness from services. However, it is recognised that all four of these sites provided some contribution by fulfilling local employment needs.

5.19 E33 (Croft End Mill) is a vacant former mill which is being marketed but this constrained building does not meet some modern needs for employment space. This small site is constrained by the adjacent river, appears to have surface drainage problems and parts of the site are close to residential dwellings. The site is marketed for employment use and has an extant planning permission from August 2004 for a printing facility but has not come forward for active employment use to date. Overall, the site was identified as being of ‘poor’ quality by the assessment due to its site constraints and proximity to residential dwellings.

5.20 **Helmshore/Haslingden**: sites in this area include E31 (Mayfield Chicks), which although benefiting from good road access is a fairly rural site which is isolated from public transport links, services and labour. Part of the site is a reasonably successful employment area, but the majority comprises a collection of partially derelict farm buildings with a very low quality environment and a large cleared area in use for open storage. As a result, the site scores poorly and its development potential is limited due to its isolated location.

5.21 Another poorly performing site in this area is E30 (Musbury Fabrics) on the western side of Helmshore. The site is fairly remote from services and regular public transport services and overall the site is assessed as being of ‘poor’ quality. E30 comprises two sections: -

1. The area to the west of Holcombe Road comprises a jumbled mix of varying quality employment areas (including Musbury Fabrics) mixed in with housing and other uses. Part of this area (the south western part) is therefore currently fulfilling an employment role.
2. The area to the east of Holcombe Road comprises a large, cleared site (the site of the former Airtours head quarters). This land has limited market attractiveness to be developed for employment uses and has resolution to grant planning permission for a mixed use development incorporating employment and residential uses, subject to a Section 106 Agreement.

5.22 This area also contains a cluster of extremely well performing sites at Knowsley Road Industrial Estate, Broadway and The Courtyard (E29, E5, E53, E6 and E24) which were all assessed as ‘good’. Although these sites are fairly typical industrial estates with mid-range occupiers (and a few lower-grade occupiers), they score very highly due to their excellent road links, low vacancy rates and lack of identified development constraints. Site E53 has some remaining development potential which has an extant planning permission for a 504 sq.m B2/B1 unit (also includes retail element). In summary, they are well functioning established general industrial estates which have good market perceptions partly due to their accessible and prominent location adjacent to the A56.

5.23 A further cluster of well performing sites/areas (E25, E26, E27, E21) benefiting from their location adjacent to and direct road access onto the A56 corridor is located between Haslingden and Rising Bridge. These sites/areas are generally well occupied, relatively attractive employment areas, which appear to be functioning well and have scored well accordingly. St Crispin Way (E25) performs particularly well because it is a B1/B2 business park attracting slightly higher value users and with a better quality environment. Waterside Business Park (E27) performs slightly less well because of its marginally lower quality environment and slighter higher vacancy levels; although there was not a reason apparent to NLP as to why the vacancy levels were slightly higher than other business parks in the area. These sites were all assessed as 'good'.

5.24 A fairly well performing site is E4 (Holden Vale), which performs an important function as one of the few B8 warehouse distribution developments in Rossendale with new buildings and a higher quality well managed environment. Although remote from services and public transport links, this development benefits as a result of its good road links and was assessed as 'good' accordingly. We note that E4 has some remaining development potential, with part of the site having planning permission to be developed for a training complex/office building.

5.25 Other existing employment sites/areas in this locality include E22, E3, E20 and E23. These sites/areas all provide general B2 industrial space. Despite its above average road links, Hud Hey Industrial Park (E20) scores just below average because of its poor quality environment and high vacancy levels. Reel Vision (E3) and Warton (E22) both score fairly well due to their good strategic location, but under perform due to the low quality estate roads linking them with the A680. A small, undeveloped area within site E3 is identified in information provided to NLP by the Council, as having development potential remaining. Overall E3 was assessed as 'good' and E22 as 'average' reflecting the particular attractiveness of the building on E3 in meeting modern building requirements and its slightly better accessibility compared to E22.

5.26 Although well located in relation to the road network, Prinny Hill/Elekem (E23) is a mostly vacant, small employment site in a fairly residential and low profile area and is surrounded by residential properties. Although in existing B2/B1 employment use, Prinny Hill/Elekem is used at low intensity and therefore makes a limited economic contribution. Site E23 therefore scored 'average' overall.

5.27 Site E2 (Newlock, Haslingden) is a largely cleared site which contains bands of concrete together with limited residential development. The site is sandwiched between existing employment areas E20 and E21 and is an undeveloped allocation. In common with adjacent sites, site E2 benefits from its proximity to the strategic road network, although site E2 can only access the A55 via the A680 or potentially via an adjacent employment area. Development of E2 is constrained by existing residential dwellings within the site. Overall, the site is identified as falling within the 'average' category of assessed sites which reflects its good location and development potential, but that there are also site constraints which need to be addressed.

5.28 Further to the north and in a more remote area is site E19 (Hollands Pies). This site is occupied by Hollands Pies and Puddings and Baxenden Chemicals. Both businesses appear to be a well established and the site is well linked to the A56. It therefore scores well and was assessed as being of 'good' quality.

5.29 Site E1 comprises an undeveloped area of grassland adjacent to Hollands Pies and Puddings and Baxenden Chemicals (E19) which is allocated for employment development. Although the site is in a fairly rural location it benefits from its proximity to the strategic road network and proximity to the adjacent well established employment use. The site has no significant identified development constraints, although upgrading of local infrastructure including roads may possibly be required for the site to be brought forward. The site has accordingly scored fairly well and within the 'good' category of assessed sites. It is understood that this site was allocated specifically to allow for the expansion of Baxenden Chemicals, which has not occurred (the site has been allocated since 1995). NLP is not aware of a requirement by Baxenden Chemicals to expand in the foreseeable future. However, whilst the site has not yet come forward, subject to satisfactory access to the site being obtained, it is considered to be suitable for employment use and scored well in the site assessment accordingly.

5.30 Site E81 (land adjacent to Rising Bridge Inn) comprises open grassland. The site, which fronts the A680, benefits from very good strategic and local road access, but is a little distant from local labour and services. The plot is fairly small, but no obvious development constraints have been identified. Although it does not appear from the site visit to be currently marketed for employment use, planning permission was granted in September 2008 for 3,021 sq.m of office accommodation on the site. Pavillion style development comprising of three two-storey detached office blocks, each with 9 office suites, which will be completed in June 2010 and are currently being marketed by HW Petty and King Sturge. The market appraisal which accompanied this application identified that there is demand for the particular product proposed (pavilion style, 'own front door' offices that can be purchased or rented) and this has been confirmed through our feedback from local agents. It is agreed that offices are an appropriate for this site. Overall, the site scored within the 'good' category.

Rawtenstall

5.31 The central area of Rossendale around Rawtenstall includes a number of existing and allocated employment areas. Rawtenstall is the largest centre in Rossendale, therefore the majority of these employment areas benefit from good access to local services and public transport. Rawtenstall is also well located for the A56 and many of its employment areas therefore benefit from good strategic road access. Table 5.5 shows the score achieved by sites/areas in Rawtenstall.

Table 5.5 Rawtenstall Existing Sites/Areas

Ref.	Site/Area	Area	Score	Overall Rank
E40	Hardmans Business Centre	1.67	41	Good Quality
E51	Kingfisher Centre, Burnley Road	0.38	40	
E94	Valley Centre	1.16	40	
E7	Site under construction, Rossendale Business Park (New Hall Hey)	5.9 (of which 3.41ha available)	38	
E41	Units on New Hall Hey Road	1.65	38	
E93	St Mary's Chambers	0.07	38	
E92	Whitehead Place, Rawtenstall	0.65	36	
E43	Lamberts, Fallbarn	2.02	34	Average Quality
E88	Rossendale Motorshow	0.68	33	
E39	Riverside Business Park	6.06	32	
E38	Novaks Bridalwear/JB Broadleys, Reedsholme	3.4	31	
E11	Paddlock, Cloughfold	0.32	30	
E44	Jacobson Footwear, Cloughfold	5.45	30	
E91	Kenross Containers, Kippax Mill	1.37	28	Poor Quality
E37	Riverside Works North	1.73	26	
E9	Riverside Works South	1.12	25	

5.32 ***Central and Eastern Rawtenstall***: Sites E51 (Kingfisher Centre) and E93 (St Mary's Chambers) are both well located and attractive office developments. They are both well served by local services and public transport and benefit from good local and strategic road access. The Kingfisher Centre is one of the most high profile office developments in Rossendale and is actively marketed. St Mary's Chambers is a high quality conversion which is also being marketed. Both sites scored highly due to the above factors; although it is noted that a number of units remain vacant. There is no identified potential for further development of either site. These sites perform an important function as two of the few offices sites in Rossendale; they were therefore both scored as 'good' quality.

5.33 Site E92 (Whitehead Place) is currently under construction for a mixed-use development including a 2,320 sq.m (5,000 sq.ft) office complex which is currently being marketed. Like other sites in this location, the site benefits from good access to local services, public transport and strategic road links. The site has the potential to perform an important contribution to the office offer of Rawtenstall and has accordingly scored within the ‘good’ category of sites.

5.34 The Valley Centre (E94) incorporates Rossendale Council’s offices, a largely vacant shopping centre and car parks. The site therefore has significant potential for redevelopment or partial redevelopment and indeed the site does have extant planning permission for a mixed use residential and retail led redevelopment and some office accommodation. This town centre site benefits from excellent access to local services and public transport and is well located for strategic road links. Although the shopping centre is currently vacant and the offices on the site are of below-average quality, the site has very good potential due to its location and development potential and would be likely to be suitable for further office development. The existing Council offices on the site obviously perform an important employment function. Accordingly, site E94 scored within the ‘good’ category of sites.

5.35 E43 and E44 are both successful (although visually fairly unattractive) general industrial estates with low vacancy levels. They have good access to public transport and the strategic road network but are constrained by poor local access roads. E44 (Jacobson Footwear) contains mainly modern industrial units of medium-low quality and a gas holder. E43 (Lamberts, Fallbarn) contains a converted mill building and warehousing units of a higher quality and currently has the potential for expansion into site E11. Overall, both site E44 and E43 were assessed as being of ‘average’ quality.

5.36 The Paddock at Cloughfold (E11) offers potential for the expansion of the adjacent general employment area (Site E43). Site E11 is well located for Rawtenstall Town Centre but is located to the rear of E43 and would probably need to be accessed via the current estate road through E43. The site is not visible from the main road and is therefore in a fairly low profile location and access improvements would be required for the site to be developed. The site will only come forward if site E43 is expanded which has not occurred over the Local Plan period. Overall, the site is identified as being of ‘average’ quality.

5.37 Rossendale Business Park (New Hall Hey) (E40, E41, E88 and E39): A number of existing employment areas comprise or are close to the Rossendale Business Park (E40, E41, E88 and E39). These sites vary in their character but they all benefit from good access to local services in Rawtenstall centre, easy access to facilities in the town centre and good public transport links because Rawtenstall bus station is nearby. The majority of the sites have also seen recent investment. These sites are in a relatively high profile location near the centre of Rawtenstall with good local access via good estate roads.

5.38 E40 (Hardmans Business Centre) at Rossendale Business Park contains a Grade II listed building converted into offices, purpose-built offices, a public house and a vacant industrial unit. The vacant unit on this site has potential for sub-division for starter uses. Overall this site was good quality and has the potential to make an important economic contribution and was therefore assessed as being of ‘good’ quality.

5.39 Site E41 (Units at New Hall Hey Road) comprises Rawtenstall tourist railway station, a motor showroom, various low quality industrial units and some residential development. It is in a high profile location at the gateway to the Rossendale Business Park Business Park. However, there is a higher rate of vacancy within this area and it contains lower end users than adjacent sites. However, like site E40, this site has the potential to make a more important economic contribution than currently and in reflection of the site’s location and potential E41 was assessed as ‘good’ quality overall. There is some remaining development potential on the site and this plot has an extant planning permission for a 470 sq.m B1 light industrial unit with ancillary retail space.

5.40 The Riverside Business Park (E39) and Rossendale Motorshow (E88) sites are on the periphery of the Rossendale Business Park and are in a slightly lower profile location than sites E40 and E41. E39 contains average quality industrial units with mid-level occupiers but is quite constrained by poor local road access, a water treatment works and ‘significant’ flood risk and has some vacancies. Overall, site E39 therefore scored around average. Site E88 contains a motor showroom and garage together with land to the rear. It is well located for Rawtenstall Town Centre and public transport links and scored towards the upper end of the ‘average’ category.

5.41 Rossendale Business Park (New Hall Hey) also includes one site which is committed for employment development: site E7 is a very well performing site which is located within the designated Rawtenstall Town Centre boundary and is in a high profile location. The site also has good access to local services and public transport. Site E7 is currently partially under construction for an A1, A3 and D2 development. However, the planning permission for the retail development (LPA Ref: 2007/030) includes a condition requiring that within 18 months of occupation of Unit A1, not less than 1,651 sq.m of B1 floorspace shall be constructed and made available for occupation. Thus, although part of the site is under construction for A1 use and so is unlikely to be available for B-Class employment uses, the remainder (or some of the remainder) of the site is committed for B1 development. Overall, the site is identified as a good quality site which is well located, well linked to the wider Rossendale Business Park development and with no obvious development constraints.

5.42 Burnley Road: This area incorporates the two sites that comprise the Riverside Works (E37 and E9) together with Novaks Bridal wear and JB Broadleys in Reedsholme (E38) and Kenross Containers at Kippax Mill (E91). These sites are in a relatively isolated location within the Borough which is some distance from the strategic road network and main service centres. E37 and E9 are similar in character and contain low profile, general industrial units. The units on E9 are generally poor quality, older buildings whilst those on E37 are of slightly better quality. The local road access and public transport access for these sites is poor and they therefore achieved low scores in the site assessment and were scored as 'poor' overall. However, these sites are nearly fully occupied and therefore clearly meet a local demand.

5.43 Site E91 (Kippax Mill) also scores within the 'poor' category. This single occupier site which is in open countryside, is poorly located for the strategic road network and for accessing services. Furthermore, local roads linking the site with Burnley Road are of low quality. However, the site is occupied and in well-established use and appears to be meeting the needs of the current occupier.

5.44 Site E38 (Novaks and JB Broadleys) contains a textiles factory, clothing shops and some residential development. The development, which is of average quality, achieved a mid-range score in the site assessment. It fronts Burnley Road (A682) and so is in a higher profile location than E37 and E9. However, site E38 suffers as a result of its location close to incompatible residential uses. Overall, this area is identified as performing a local function as a mixed use development.

Bacup/Waterfoot/Stacksteads

5.45 This part of the Borough covers the area east of Rawtenstall and includes the settlements of Bacup, Waterfoot and Stacksteads. It is a varied area, covering both urban and rural parts of Rossendale. Although some of the area is fairly well located for Rawenstall, the area also includes some of the most remotely located sites assessed (particularly those sites to the north of Bacup and to the north of Waterfoot). Table 5.6 shows the score achieved by sites assessed in Bacup, Waterfoot and Stacksteads. Only one site in this sub-area of Rossendale achieved a 'good' ranking.

5.46 Demand in these areas is generally more limited and localised and the area has a high proportion of mill buildings and older industrial estates which are unable to meet modern requirements and therefore remain vacant or under-utilised. However, the sub-area also includes a number of modern buildings including the J&J Ormerod building at Futures Park.

Table 5.6 Bacup/Waterfoot/Stacksteads Existing sites/areas

Ref.	Site/Area	Area	Score	Overall Rank
E69	Futures Park, Bacup	5.38 (total)	35	Good Quality
E45	Industrial units at Highfield Road, Hareholme	4.11	34	Average Quality
E72	Bacup Shoe Factory, Stacksteads	3.07	33	
E65	Suttons, Bacup	11.21	33	
E66	Beech Industrial Estate, Bacup	2.63	32	
E64	New Line Industrial Estate	5.64	32	
E73	Shadlock, Newchurch Road, Stacksteads	1.33	32	
E13	Parks Road Industrial Estate, Bacup	1.02	32	
E70	Mill on Farholme Lane, Stacksteads	2.35	31	
E46	Warth Lane Industrial Estate	7.38	31	
E67	Meadow Mill, Bacup	0.78	30	
E71	Blackwood Road, Stacksteads	1.45	29	Poor Quality
E50	Hugh Business Park, Waterfoot	1.64	28	
E47	Lambert Howarth Distribution Centre, Whitewell Bottom	2.13	27	
E12	B & E Boys Yard, Waterfoot	0.45	26	
E63	Lancashire Sock Factory, Bacup	0.99	26	
E68	Broadclough Mill, Bacup	1.15	24	
E49	Vacant Joshua Hoyles Textiles Warehouse, Waterfoot	0.84	23	
E48	Albion Mill, Waterfoot	3.12	23	
E54	Kearns Mill, Waterfoot	1.02	17	

5.47 Waterfoot: Highfield Road (E45) is located to the west of Waterfoot and is a partly run-down industrial estate which is mainly occupied and because it fronts the A681 benefits from fairly good access. Nearby Warth Lane (E46) also fronts the A681 and is well located for Waterfoot Town Centre services. It comprises an industrial estate/cash carry area of average quality with mixed quality of buildings. Site E46 has one large vacant building however and is in proximity to residential dwellings. Both sites E45 and E46 scored ‘average’ overall and appear to be meeting a local need for industrial/cash and carry units.

5.48 Hugh Business Park (E50) is also well located for Waterfoot Town Centre and reasonably located in relation to the local road network and public transport. However, the site has one large vacant unit and it is generally run-down and with a poor quality environment and low value/intensity uses. In common with other sites in this area, the site’s isolation from the strategic road network means that demand is localised. The site is therefore rated as ‘poor quality’, although it is recognised that the site possibly has potential for more intensive economic development and there may be scope to improve the quality of the site's environment. Like sites E45 and E46, it would appear that site E50 plays an important role in meeting a particular local employment for uses which include a reclamation yard and general industrial uses.

5.49 Some distance to the south of Waterfoot and accessed via the narrow and twisted Cowpe Road is a derelict former employment building (known as Kearns Mill) which is currently under demolition (E54). A board advertises the plot as a residential site for sale and the site has planning permission for residential development; it is therefore assumed that the site is unavailable for employment development. In any case, due to the extremely isolated location of the site and its proximity to residential uses it is not identified as a suitable employment use and this is reflected in its extremely low score. This site was not allocated for employment use in the Local Plan, is in a poor location and is unlikely to be attractive to the market.

5.50 On Burnley Road East, to the north of Waterfoot is a storage yard (E12) together with adjacent offices and large vacant warehouses (E49). Although the offices are of reasonable quality, this area is generally low-grade and unattractive and in very low intensity employment use. The potential of the sites to be developed for higher intensity economic use is limited by their isolated location and this is reflected in the low scoring of these sites as 'poor' quality.

5.51 Also on Burnley Road East are two large and established general industrial areas referred to as Albion Mill (E48) and Lambert Howarth Distribution Centre (E47). These sites are both isolated from the strategic road network. Albion Mill has a poor quality environment and occupiers, and suffers from high vacancy levels; it has therefore scored very poorly in the assessment. Although located further to the north, Lambert Howarth Distribution Centre is all occupied and is reasonably attractive with a reasonable standard of occupier; it therefore rates better than E48; but still scores poorly. Both E47 and E48 fall within the 'poor' category of the sites assessed, although it is recognised that E47 in particular appears to be fulfilling a local need for employment space and both sites have a number of existing occupiers.

5.52 Located between Waterfoot and Stacksteads, Shadlock Contractors and adjacent uses, Shadlock (E73) is an industrial area of average quality. All units are currently occupied and occupiers are of average quality. The area is meeting a demand and has scored as 'average' overall.

5.53 Stacksteads: Sites E70, E71 and E72 are industrial areas on Newchurch Road in quite a remote location. They all suffer from poor access to local services (being located some distance from the closest designated centres of Rawtenstall and Bacup) and the strategic road network but reasonable local road access via the A681. Site E70 (Mill on Farholme Lane) scored of 'average' quality in the site assessment because although it appears successful and highly occupied, the buildings and occupiers are of mid to low quality. Site E72 (Bacup Shoe Factory) scored better (but also of 'average' quality) because there is evidence of more recent investment on the site and therefore there may be potential for the site to be developed more intensively to capitalise on its success. Site E71 (Blackwood Road) had high vacancy levels despite the existing warehouse units on the site being relatively modern; the site therefore scored poorly, but has potential for further development (in cleared site). Sites E70 and E72 contain former mill buildings which may not be suitable for modern industrial purposes.

5.54 Bacup: Futures Park (E69) is a partially developed business park with good access to local services and the labour market. Approximately 2.63 ha remains undeveloped at the site, across 4 plots. One of the undeveloped plots has planning permission for a B1/B2 business/general industrial unit. The undeveloped plots without planning permission are considered as a potential, new employment location in Section 10 of this report. The existing office units on the site are of high quality and contain high quality occupiers. The development (which is partially funded by the public sector) is heavily marketed and internal estate roads to some of the undeveloped plots are already constructed. However, we understand that part of the site is constrained by contamination and other site constraints. The site therefore falls within the 'good' quality category but at the lower end of this category.

5.55 Sites E13 (Parks Road Industrial Estate), E65 (Suttons) and E66 (Beech Industrial Estate) are average quality industrial estates on the edge of Bacup Town Centre. Due to their location they have good access to local services and the local road network but they are some distance from the strategic road network. These areas have relatively low vacancy levels and function as Bacup's main employment areas. E13 has a small, vacant plot identified in information provided by the Council as an allocated site with remaining development potential. All three sites scored within the 'average' site category, with sites E65 and E66 scoring towards the upper end of the 'average' site category. We note that site E65 has extant planning permission for a foodstore on part of the site (LPA Ref: 2006/673).

5.56 Sites E67 (Meadow Mill) and E68 (Broadclough Mill) are located on the periphery of Bacup Town Centre on Burnley Road (A671). They contain fairly low quality industrial units with low profile occupiers. The areas are within walking distance of Bacup Town Centre and therefore benefit from good access to local services and public transport. Site E67 contains some limited potential to expand the industrial estate to the north. Overall, site E67 was assessed as being 'average' quality and site E68 as 'poor' quality. The lower score of E68 reflects its high vacancy levels and the planning constraints presented by the Listed Building within the site.

5.57 E64 (New Line Industrial Estate) is an attractive industrial estate that has seen some recent investment. It contains mid-quality occupiers and has good local access. However, the area suffers from poor access to the strategic road network, local services and public transport links. It therefore performed within the 'average' category in the site assessment. There is no identified potential for further development on this site.

5.58 The Lancashire Sock Factory site (E63) performed poorly in the site assessment and was classified as 'poor' quality. The site contains the Lancashire Sock Factory, a car garage and a vacant unit which are of average quality. The Lancashire Sock Factory building is an old building which does not meet all modern employment requirements. The site is not located near to the strategic road network or local services and has poor access to public transport. It is a however a well proportioned site with good local access.

Facit and Whitworth

5.59 The south eastern part of Rossendale Borough contains a relatively small number of identified employment sites/areas, which is reflective of the area's lack of major settlements. All of the employment sites/areas in this area are along or in close proximity to the A671 corridor, where linear settlements including Whitworth, Shawforth and Facit are focussed.

5.60 Like Bacup and Waterfoot, demand in these areas is generally limited and localised and the area has a high proportion of mill buildings and older industrial estates which are unable to meet modern requirements and remain vacant or under-utilised.

Table 5.7 Facit and Whitworth existing sites/areas

Ref.	Site/Area	Area	Score	Overall Rank
E52	Fudge Factory, Facit	0.28	37	Good Quality
E57	Brookside Mill, Whitworth	1.89	31	Average Quality
E58	Daniel Street Industrial Estate, Whitworth	2.34	31	
E61	Slingco, Cowm Park Way North, Facit	0.7	30	
E15	Samba Studio, Facit	0.93	30	
E62	Units off Market Street, Shawforth	1.09	29	Poor Quality
E14	Barlow Bottoms, Whitworth	3.54	29	
E59	Facit Mill, Facit	0.69	29	
E60	Kennedy Transmission, Station Road, Facit	0.68	28	
E55	Albert Mill/Sunnyside Works, Market Street	1.07	24	
E56	Orama Mill, Cowm Park Way	2.34	23	

5.61 Shawforth: Site E62 (units off Market Street) comprises a general industrial area which is a little jumbled with residential and varying employment uses mixed together. This area is of average quality appearance and environment but suffers from poor links with services/labour and public transport and some of the employment uses are in proximity to incompatible residential uses. On balance, this general industrial area is of below average quality and has accordingly scored within the 'poor' quality overall the area's role in meeting local employment needs is recognised.

5.62 Facit: A cluster of six sites/areas is found in Facit, which all suffer from relatively poor links to the strategic road network.

5.63 The first site assessed in Facit is located on Cowm Park Way North (E61) and therefore suffers from a low profile location which is not visible from the main road. However, the existing industrial units on the site are relatively attractive and modern and the area has further development potential. On balance, despite its less than ideal location, this site is ranked around average.

5.64 Site E14 (Barlow Bottoms) is an undeveloped allocation with poor connections to the strategic road network and is remote. However, part of the site directly fronts the A671 and so has good local road connections. This undeveloped grassland site is physically attractive but is divided by the river Spodden and contains a number of trees. The site is marketed as a development opportunity, but its low profile location means that it may only attract low end employment users which may be capable of being accommodated on existing employment sites in the Borough. The King Sturge Employment Land Study completed in 2007 identifies E14 as a disused tip site and therefore there may be contamination issues relating to its redevelopment. The development of the site is also constrained by the river through the site. The site would also be a fairly large employment development in relation to its location within the Borough. Overall, the site is assessed as falling within the 'poor' quality of sites assessed.

5.65 Other sites located in Facit include Station Road (E60), Samba Studio (E15) and Fudge Factory (E52); these sites all immediately adjoin each other. Station Road (E60) is a general industrial area which takes up the rear part of this employment area and has the lowest grade occupiers and quality of buildings; this is reflected in its fairly low rating within the 'poor' category of sites. However, part of E60 does have extant planning permission to be redeveloped for new industrial units. Samba Studio (E15) comprises a number of average or below average employment buildings and has also therefore also scored fairly poorly (at the low end of the 'average' category). We note that one of the smaller employment buildings within site E15 appears to be in established use as a dance studio. Sites E15 and E60 scored below average due to their location, low quality of buildings, haphazard layout and lack of investment. However, they are identified as having potential and are also fulfilling a local need for employment buildings.

5.66 Fudge Factory (E52) comprises Coates engineering and a fudge factory (which includes a café and shop). Site E52 has scored much better than the other two sites in this location (E60 and E15) and scored within the 'good' category. This score reflects the evidence of recent investment on part of the site and the plot's more prominent location immediately adjacent to the A671.

5.67 Overall, sites E52, E60 and E15 appear to be both meeting a local need for employment space and beginning to diversify away from B-class uses.

5.68 The final assessed site in Facit was Facit Mill (E59) which scored within the 'poor' category of sites. This vacant building scored poorly because it is semi-derelict and although marketed by King Sturge, there would appear to be limited market interest. This old building does not appear to meet many modern employment space requirements. The building does have redevelopment potential, but its market attractiveness is likely to be restricted to fulfilling a local need for employment buildings due to the site's location some distance from a strategic road and within a relatively remote part of the Borough.

5.69 Two sites/areas are located on the A671 between Facit and Whitworth; Daniel Street Industrial Estate (E58) and Brookside Mill (E57). Both areas are low grade industrial estates with poor quality buildings. However, both E58 and E57 have high occupancy rates indicating that they may be meeting a local need for this type of employment land provision and they accordingly scored within the 'average' category of assessment.

5.70 Whitworth: Within Whitworth, the vacant Albert Mill/Sunnyside Works on Market Street (E55) has scored badly and therefore falls within the 'poor' category. This derelict building does not currently contribute anything to the employment provision of the Borough and it does not meet modern requirements for employment space. Although the building directly fronts Market Street, access into the site is constrained by a steep level change and the site is surrounded by residential development.

5.71 Orama Mill (E56) is located close to Cowm Park Way but lacks frontage onto a main road and so is not in a very visible or high profile location. The building on the site has largely been demolished. The site's potential for new employment development is limited by its close proximity to sensitive uses, including the adjacent school. The site therefore scored very poorly despite it being a good size and well proportioned with no obvious development constraints.

Available Land (Commitments)

5.72 As noted previously, NLP has undertaken site visits of a total of 297.46 hectares of developed, committed and option (potential new) employment sites. The above text focuses on existing employment areas and sites under construction (paragraphs 5.14 to 5.71). The following section of the report focus on committed sites (allocations and sites with extant planning permission for employment development).

5.73 Information has been provided by Rossendale Borough Council identifying all available sites which are 'committed' for employment development (i.e. Local Plan employment allocations and sites with extant planning permission for employment use). Although some 297.46 ha of employment land exists in total across all the assessed sites (existing, committed and proposed), a large proportion of this land comprises existing employment areas; the amount of developable land remaining which is committed for employment is considerably less; at 18.70 hectares across 14 sites. These 14 sites comprise: -

- 8 employment allocations which have not been built out or have significant plots remaining undeveloped: these comprise –
    - Remaining land at New Hall Hey (site E7) (NB: E7 requires employment floorspace to be built as a requirement of a condition of an implemented retail permission elsewhere on the site).
    - Land adjacent to Baxenden Chemicals (E1);
    - Newlock (E2);
    - Paddock, Cloughfold (E11);
    - Barlow Bottoms (E14);
    - Imperial House, Holden Vale (E4) (NB: as well as being allocated for employment, site E4 has extant planning permission for employment development);
    - Reel Vision (E3); and
    - Park Road Industrial Estate (E13).
- 2 sites which are not allocated but have extant planning permissions for employment development:
    - Rising Bridge, Haslingden (E81); and
    - Plot 3 at Futures Park (E69).
- 1 existing, long-term vacant employment building with planning permission for new employment development: Croft End Mill at Edenfield (E33).
- 3 sites with development potential within wider existing designated J3 employment sites. These sites all have extant planning permission for employment use and comprise;
    - Land adjacent to the former Kwik Save at New Hall Hey (E41);
    - York Avenue within Knowsley Road Industrial Estate (E53); and
    - Spodden Mill, Facit (E60).

5.74 Of the 18.70ha of available land, 11.64ha is assessed to be good quality, 3.28ha is assessed to be average quality and 3.76ha is assessed as poor quality.

5.75 Table 5.8 includes information on the availability of committed sites. It shows that all sites are assumed to be available.

5.76 The site areas for some of the allocated sites are different to that shown in the Rossendale District Local Plan. This is because due to the introduction of GIS to measure sites at the Council, the measurements are more accurate.

5.77 Table 5.8 also provides information on factors which may constrain the ability of sites to come forward for development. This is only based on information clear from the site assessment and so other, unidentified site constraints are likely to be present. The table identifies that a number of sites are constrained by factors such as poor road access and contamination. It is therefore identified that the following sites may be limited in their ability to come forward immediately, although all these constraints are identified as being capable of being resolved within a short-medium timescale: -

- Site E69 (Futures Park): is known to have site contamination issues, but we understand these can be overcome.
- Site E1 (Land adjacent to Baxenden Chemicals): local infrastructure improvements (including to local roads) may possibly be required for the site to be brought forward.
- Site E2 (Newlock): site is constrained by residential dwellings located close to the centre of the site.
- Site E11 (Paddock, Cloughfold): access to the site would need to be improved for it to come forward for employment development.
- Site E14 (Barlow Bottoms): development of the site is constrained by the river and possibly by contamination.

Table 5.8 Identified Available Employment Land

Ref.	Site	Area	Score	Overall Rank	Comments and Availability	Planning Status
E41	Land adj former Kwik Save building (Units at New Hall Hey Road)	0.16	38	Good	Falls within existing employment site E41 (score reflects score for E41 as existing site). Assumed to be available and developable.	Planning Permission for 470 sq.m B1 light industrial unit with ancillary retail space.
E53	York Avenue (within Knowsley Road Industrial Estate Site C)	0.23	38		Falls within existing employment site E53 (score reflects score for E53 as existing site). Assumed to be available and developable.	Planning Permission for 504 sq.m B2/B1 unit (also includes retail element).
E7	Site partly under construction, Rossendale Business Park	3.41	38		Part of the site is under construction for a retail development. The remainder is assumed to be available and developable.	2.49ha of this 5.9ha site is under construction for a retail development. (LPA Ref: 2007/030). However, the remainder of the site (or part of the remainder of the site) is committed for B1 development. For, the implemented retail permission includes a condition requiring that within 18 months of occupation of Unit A1, not less than 1,651 sq.m of B1 floorspace shall be constructed and made available for occupation
E3	Reel Vision, Commerce St	0.24	37		Plot remaining within allocated site E3 (score reflects score for E3 as existing site). Assumed to be available.	Previously allocated site (policy not saved).
E4	Imperial House, Kingsway (Holden Vale, Helmshore)	0.7	36		Falls within existing employment site E4 (score reflects score for E4 as existing site). Assumed to be available and developable.	Planning Permission for 668 sq.m training complex/office building.
E1	Land adjacent to Baxenden Chemicals, Haslingden	5.62	36		Assumed to be available, although local infrastructure improvements (including to local roads) may possibly be required to bring the site forward.	Previously allocated site (policy not saved).
E81	Land adjacent to Rising Bridge Inn, Blackburn Road	0.57	35		Site is assumed to be available and developable.	Planning permission for 3,021 sq.m offices.
E69	Plot 3, Futures Park, Bacup	0.38	35		The site is available but is known to have constraints to development, including contamination.	Plot 3 has planning permission for 786 sq.m B1.B2 Business / General Industrial Unit (2006/256
E13	Park Road Industrial Estate	0.33	32	Average	Plot within site E13 (score reflects score for E13 as existing site).	Plot remaining within what was allocated site (policy not saved)
E2	Newlock, Haslingden	2.96	31		Assumed to be available, although it is constrained by residential dwellings located at the heart of the site.	Previously allocated site (policy not saved).

E11	Paddock, Cloughfold	0.32	30		Access to the site would need to improved for this site to come forward for employment use. The site is assumed to be available.	Previously allocated site (policy not saved).
E14	Barlow Bottoms, Whitworth	3.54	28	Poor	The site is assumed to be available but development is constrained by the river and possibly contamination and the site scored poorly in the assessment.	Previously allocated site (policy not saved).
E33	Croft End Mill, Edenfield	0.05	25		Existing employment site E33 (score reflects score for E33 as existing site). The site is available but scored poorly in the site assessment.	Planning Permission for 1,483 sq.m printing facility
E60	Spodden Mill (Kennedy Transmission), Facit	0.19	27		Falls within existing employment site E60 (score reflects score for E60 as existing site). Assumed to be available and developable.	Planning Permission for six industrial units totaling 638 sq.m.
Total		**18.70**			-	

Conclusions

5.78 Overall, the Borough contains a range of industrial sites of differing quality and type. The Borough contains relatively few office developments and these tend to be clustered in and around the service centre of Rawtenstall together with office accommodation at Futures Park, Bacup.

5.79 The Borough's historic heritage is reflected in the high proportion of mill buildings found across the Borough, many of which are unable to meet modern employment requirements and therefore remain vacant or under-utilised.

5.80 The better scoring sites are generally located along the A55/M66 corridor or in Rawtenstall. There is the potential to further capitalise on the accessibility of these areas through the upgrading of existing employment sites and by new employment development.

5.81 Areas in the east and north of the Borough generally served a more localised market and these areas have a high proportion of older industrial estates.

6.0 # Economic Potential and Growth Sectors

6.1 This section considers the future economic growth potential of Rossendale and the scope for various economic sectors to grow within it in the period up to 2026. This analysis reflects the findings of the Borough's strengths, weaknesses and opportunities identified earlier in this report, recent economic and investment trends within Rossendale and the wider North West region, discussions with consultees and relevant economic and planning policies.

Context

6.2 Consideration of the future economic role of the Borough draws on the earlier analysis of its current strengths and limitations. Rossendale's competitive advantages that could help shape its future economic role were seen as:

- reasonable transport accessibility to the M62 and the M65 corridors via the A56 passing through the Borough;
- strong recent growth in financial and other service activities, albeit from a very low base;
- low workplace wage levels;
- improving rates of business start-up in recent years; and
- good quality of life factors with reasonable housing costs and attractive countryside.

6.3 Weaknesses and potential threats include:

- its small, mainly rural, local economy with recent employment contraction giving a smaller base from which to generate growth;
- proximity to the much larger economy of Greater Manchester and major economic developments in nearby districts;
- poor accessibility in parts of the Borough;
- lack of any large town or flagship business location;
- relatively few residents with higher level skills;
- over-representation in contracting sectors such as manufacturing; and
- low levels of inward investment and business relocations from elsewhere.

6.4 The Rossendale Economic Strategy 2008-11 does not target any specific sectors of the economy for growth, apart from tourism. In terms of employment space, this strategy aims to ensure the Borough has enough sites of good quality to support the growth of existing businesses as well as to attract businesses to the Borough. This should include protecting existing employment sites, identifying new sites and preparing land for development by the private sector.

Future Potential

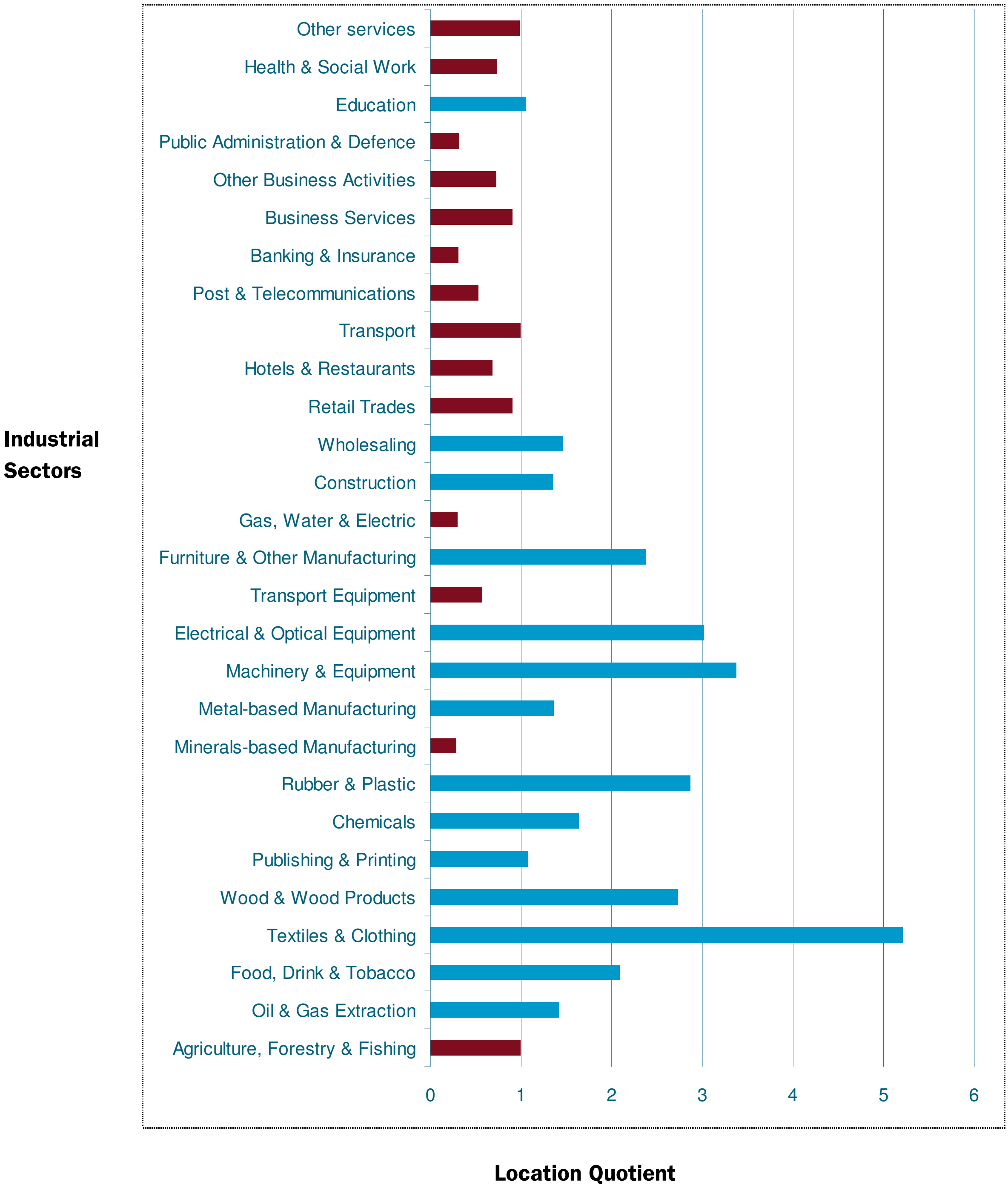
6.5 In terms of what sectors the Borough has potential to attract or grow in future, the analysis in Figure 6.1 of any current over or under-representation of jobs in specific sectors can provide some guidance. This method uses the location quotients of each sector – the proportion of employees in that sector locally divided by the equivalent figure for the region.

6.6 Sectors scoring over 1 indicate a higher representation than the North West regional average (in blue on the figure below), those below 1 a lower representation (in red on the figure below). The length of the bar indicates the extent of such under or over-representation. Where sectors are over-represented, it suggests that Rossendale offers some competitive advantage that has allowed that sector to remain there and grow, although it may also partly reflect historic factors.

6.7 Rossendale currently has a much higher representation, relative to the North West region, in a range of manufacturing sectors, many more traditional and lower-value (including textiles, machinery & equipment, furniture & other manufacturing, electrical & optical, rubber & plastics and wood). It also has relatively higher proportions of jobs within the construction and wholesaling/distribution sectors.

6.8 Services, in contrast, are much less strong with business services, banking, insurance, telecommunications and publishing all recording below-average representation. The Borough also has a below average share of public administration employment as well as health and social work. This analysis could be interpreted as the Borough having some competitive advantage or attraction in those sectors in which it is currently strong and less advantages in its weaker sectors. However, with manufacturing its strongest area and this sector declining nationally, this may not necessarily be a strong indicator of growth potential in this case.

Fig 6.1 Location Quotients of Economic Sectors in Rossendale, 2007



Source: Based on Annual Business Inquiry, 2007

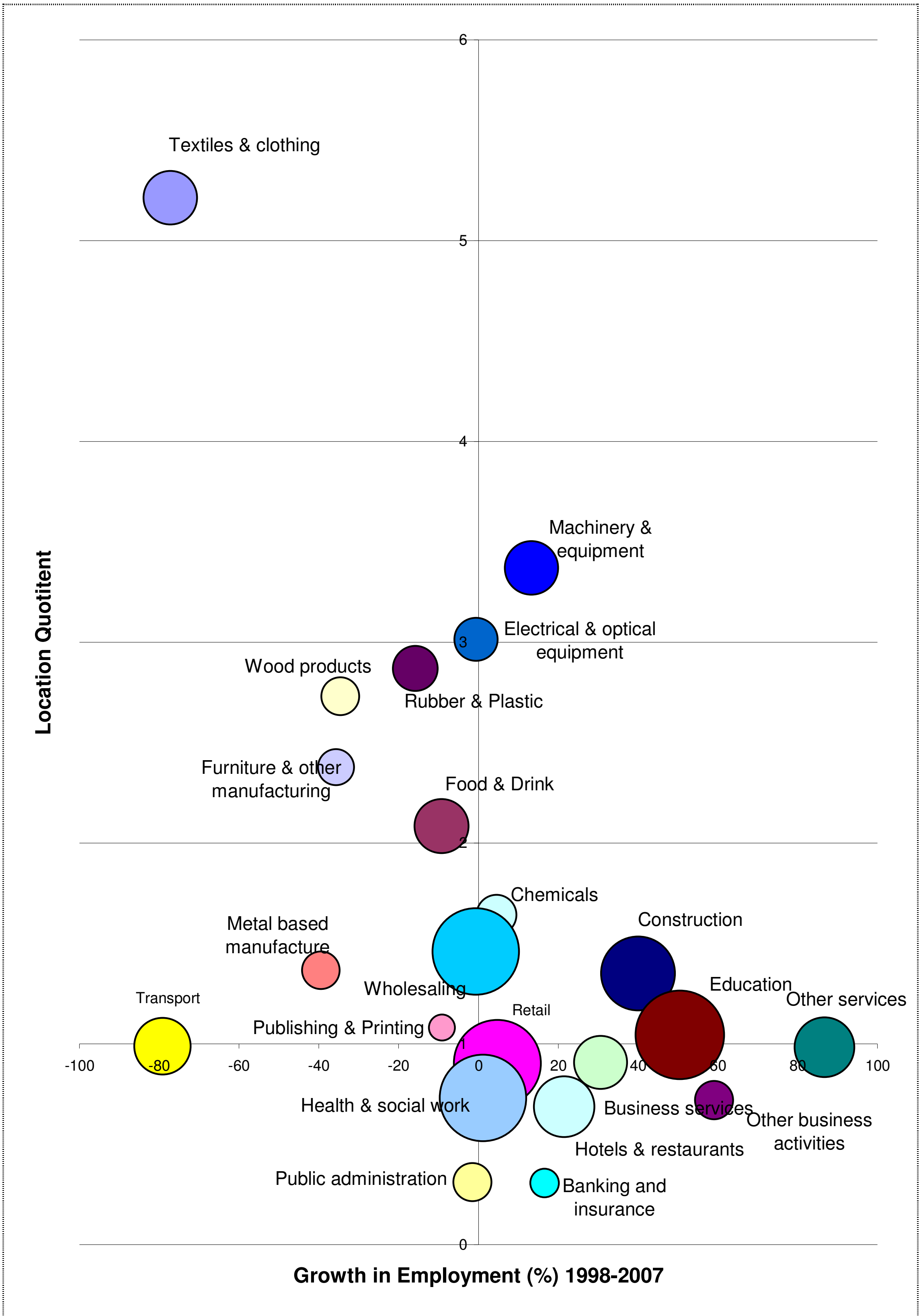
6.9 The relative representation of different sectors in Rossendale has also been cross-referenced with recent job growth of that sector in the Borough. Figure 6.2 shows the representation of sectors in Rossendale along with their employment growth between 1998-07, with the size of the 'bubble' representing the sector's level of jobs in the Borough in 2007.

6.10 Of particular importance is the top-right quadrant containing those sectors which have both high current representation and have grown in recent years. This contains relatively few sectors including machinery and equipment manufacturing, chemicals, construction as well as the predominantly non B-use class of education[29].

6.11 Sectors in the top left quadrant contain those industries which have a relatively high current representation, but which have nevertheless experienced a contraction in employment since 1998. The stand-out sector in this category is clearly textiles and clothing, which, at 774 employees in 2007, remains one of the higher employment sectors in the Borough at a rate over five times the regional average. However, as almost 3,400 people were employed in this sector in 1998, it is apparent that Rossendale's textile industry has lost over three-quarters of its workforce in less than ten years.

[29] Education sectors include primary education, general secondary education, technical and vocational education, higher education, driving school activities and adult and other education not classified elsewhere.

Fig 6.2 Growth, Representation and Size of Economic Sectors in Rossendale, 2007



6.12 Sectors within the bottom-right quadrant are those which have been growing in job terms but currently have below-average representation in the Borough. These include the service industries of retail, health, hotels & restaurants, banking & insurance, business services, other services and other business activities. Such growth patterns suggest that these sectors may offer potential to grow further and catch up with regional levels of representation.

6.13 Most traditional manufacturing activities are within the top-right quadrant, which means that they are well represented in Rossendale but with declining shares of jobs. However, many of these industries declined less than the regional average including mainly manufacturing sectors such as rubber & plastic, electrical & optical equipment, publishing & printing, wood products, food & drink, and wholesaling. This suggests that manufacturing has been holding up better in Rossendale and whilst it may continue to decline, it could remain more resilient than in some other areas.

6.14 Sectors which have low representation and have declining employment include transport (primarily due to the relocation of Air Tours) and public administration (due, in part, to a low representation generally in public services and the recent reduction in RBC jobs). These activities appear to have relatively low prospects of future growth in Rossendale.

6.15 This analysis broadly suggests that the Borough has some potential to consolidate and build on its current industrial role with its emphasis on its stronger manufacturing sectors (i.e. machinery and equipment), and possibly grow further in some service sectors, such as business services and leisure activities (i.e. hotels and restaurants) to achieve representation approaching regional levels of these not largely non B-use class sectors.

Sectors with Growth Potential

6.16 Building on this initial analysis, by looking at the locational requirements of specific sectors, a view can be formed on how likely Rossendale is to develop or attract growth in these in the future. This analysis draws on NLP's experience, as well as recent research commissioned by Manchester Enterprises[31] on the key drivers of business location for such sectors and the factors that make a location attractive to them. Whilst this research was undertaken with a focus on Greater Manchester, the key messages are considered to be equally applicable for other parts of the North West region.

6.17 **Financial / Business Services:** This is a broad sector which includes a range of specialist financial, insurance and general business service activities. Business location decisions in this sector reflect factors such as access to a skilled and diverse workforce, a good supply of high quality office premises and high quality transport and telecommunications infrastructure. Quality of life

[31] Demand for Employment Land in Greater Manchester, Arup for Manchester Enterprises, 2006

factors, including good housing and cultural facilities are also important. As a consequence, many such businesses seek city centre premises, however, a number are attracted to more peripheral business park locations that provide lower rates and ample car parking. Rossendale is currently under-represented in business services and especially in banking and insurance, although employment has risen strongly in this sector recently. However, despite growth of some 30% since 1998, the business services sector has still expanded more slowly than the regional average. Clearly the implications of the recession and the ongoing 'credit crunch' are likely to reduce opportunities for expansion in these sectors in the short to medium term, particularly if there is a renewed 'return to safe havens' whereby retrenchment results in companies retreating back to London or other core locations such as Manchester.

6.18 However, Rossendale's high quality of life and attractive natural environment could offer some potential to attract more of this type of activity, perhaps some small businesses relocating from higher-cost or more congested parts of the region, or seeking a higher quality of life if modern premises were available. However, a lack of modern office accommodation, more established office centres nearby (particularly Manchester) and low levels of higher skilled labour are constraints to any large scale growth of this sector within the Borough. Overall, there appears to be relatively limited potential for further growth in this sector.

6.19 **Distribution:** Rossendale is not regarded as a major distribution location although it has average representation in the sector. Key locational factors for distribution and logistics activities are the availability of low cost warehousing, storage and distribution sites, whilst access to the strategic road network is critical. Despite its reasonable road links in the west of the Borough, Rossendale has lacked large available sites or speculative warehousing developments, and faces competition from large strategic sites in locations better related to the motorway network, such as Rochdale and Bury.

6.20 Recent local decline in distribution employment, combined with competition from major developments nearby such as Kingsway Business Park, will limit future demand in this sector. Overall, there only appears scope for limited growth in this sector linked to the needs of its local economy, and not for Rossendale to become a significant strategic distribution centre.

6.21 **General Manufacturing:** The Borough has an established base of some older manufacturing industries, especially in footwear and textiles, often reflecting historic factors. The sector is relatively cost sensitive and therefore access to a supply of affordable sites and premises will remain important. Other key locational factors for the sector include good transport accessibility and a local labour force. However, it should be noted that such industries generally face strong competition from lower cost locations abroad.

6.22 Very few of Rossendale's manufacturing sectors have grown significantly in employment terms over recent years, although many have proved more resilient to contraction than the regional trend. While some further decline is likely overall, the Borough may have potential to attract some small scale relocations from elsewhere if good low cost sites or premises were available and this could help to off-set job losses from existing industries. Future growth would be helped by encouraging more specialist, higher-value manufacturing or R&D activities that are potentially less sensitive to competition from elsewhere, although Rossendale appears to have no particular advantages in these sectors. Overall, consolidation rather than further decline in this sector may be possible if decline in older sectors can be offset by indigenous growth and some inward relocations.

6.23 **Advanced Manufacturing / Engineering:** This sector typically includes higher value manufacturing and engineering uses relying on greater technology and skill inputs. Important factors identified for this sector are proximity to the strategic road network, availability of high quality business park environments and flexible/affordable workspace. However, the most important factor is the supply of skilled, qualified and experienced staff and this is identified as being the most significant challenge facing businesses in these sectors today. Indeed, the Manchester Enterprises study suggests that skilled staff are so important that businesses generally remain broadly in their historic location in order to retain their workforce.

6.24 Rossendale has only a modest base in these sectors, with a number of engineering firms and manufacture of electrical, optical and medical equipment and machinery being heavily over-represented. However, while modest expansion appears possible, the Borough lacks the scale of activity, the highly-skilled workforce and quality of business park type sites normally required for significant growth in these industries and future growth prospects appear limited. Some good quality employment sites and premises in accessible locations would be needed if this sector is to develop further.

6.25 **Information & Communications Technology (ICT):** Rossendale currently has quite limited representation in this sector, with a small number of firms involved in computer repair, software development and sales. Key factors for ICT can include areas of high environmental quality, skilled worker availability and a high quality ICT infrastructure, including broadband connectivity. In addition, proximity to major metropolitan centres and the market opportunities they provide can also be important. Rossendale could have some advantages from its attractive environment and reasonable links to Manchester but does not appear to have particular advantages over other locations in the region in terms of skilled workers or connectivity. Overall, only modest growth of this sector in terms of space needs appears likely although some indigenous growth and new start-ups could be encouraged through providing business incubation facilities, potentially in former mill buildings and improved broadband connectivity.

6.26 **Environmental Technologies / Energy:** This sector includes activities such as renewable energy technologies, recycling, water treatment, decontamination and other environmental consultancy. It is one that many other areas of the UK are also targeting and some are more advanced in promoting. Key considerations in location decisions for this sector include the availability of skilled labour resources, proximity to universities with relevant research facilities and the availability of business park type accommodation providing both incubator and move-on facilities. Lancaster University is a local focus for research in this sector and Rossendale has a few firms involved in filtration technologies, but other districts nearby have greater numbers of such firms. The Scout Moor wind farm within the Borough will be the largest on-shore in the UK (in terms of energy output) but the technology involved has no local links. On balance, Rossendale has no strong advantages important to this sector compared with other locations in the region. It also faces competition from facilities such as the Alternative Technology Centre in neighbouring Calderdale which has an established cluster of environmental firms. Some local engineering or manufacturing firms could capitalise to some extent but, overall, no significant growth in demand for premises is anticipated.

6.27 **Healthcare / Biotechnology:** the presence of existing clusters of activity is understood to be the primary driver of location decisions for the healthcare/biotechnology sector, whilst proximity to universities with relevant research strengths is also important, providing access to R&D activity as well as a pool of high quality staff. Many businesses seek high quality accommodation on science park locations; however, for firms engaged in large scale production, sizeable, lower-cost sites are sought. Rossendale lacks a ready supply of both science park type facilities and larger sites and does not have a medical research base or large supply of skilled workers, giving it no strong advantages in this sector at present. Health and social services employment in the Borough remains slightly below the regional average and predominantly comprises public sector employment. Overall, no significant growth appears likely in healthcare or medical equipment related activities.

6.28 **Creative Industries / Media:** This diverse sector includes activities such as publishing, art, fashion, graphics, architecture and web-design etc., which currently have modest representation in Rossendale. This is a sector that many other, more established locations are also targeting for growth, especially Salford and Manchester city centres and the Media City development. In general, the key locational factor for firms in this sector is understood to be the local environment, reflecting a desire for good quality accommodation in locations with a distinctive character. The sector is people focussed and therefore access to skilled labour is also important, whilst good quality ICT infrastructure is also sought by many businesses. A high proportion of freelance contractors typically work from home or within small offices, including in rural premises. However, media-based businesses tend to be less cost sensitive and often look for premises in town/city centre locations, attracted by the profile and cluster of related activity afforded by such areas.

6.29 Rossendale is currently home to a number of artists with several painters' studios around Waterfoot and there may be the potential for some growth of this cluster, although this is unlikely to be a major source of jobs or demand for B class space. In addition, the departure of parts of Accrington & Rossendale College from the Borough (which offered some creative industries courses) has generally left the Borough with few particular attractions for creative sectors other than its attractive environment and the heritage image of Bacup. It also has relatively few, good quality workspace premises for these firms. Provision of low-cost attractive premises may help attract some firms seeking quality of life factors, but overall, this appears a sector with low prospects for growth in space requirements within the Borough.

6.30 **Construction:** The construction sector generally does not follow any specific locational criteria and generates little in the way of property requirements, as the majority of employment is 'on site'. However, a range of industries serving the construction sector, such as builders' merchants, do generate a requirement for employment land. Typically, this is for warehousing or storage depots. Rossendale already has above average representation in this sector and recent job growth has been above the regional average. The sector may benefit from housing and business developments in the Manchester city-region, with some established construction firms expanding and other firms establishing bases locally if lower cost sites and premises can be provided in locations with good accessibility. However, with the ongoing impacts of the credit crunch and the already high level of representation of the sector, future growth in Rossendale is likely to be low.

6.31 **Tourism-related sectors:** Rossendale currently has a slightly lower proportion of employment in tourism-related sectors than the regional average and fewer jobs in this sector than other Lancashire districts. The Borough also has the lowest number of tourist accommodation bedspaces of any district within the North-West region and does not have any official caravan or camping sites[32]. However, with attractive rural landscapes and areas of heritage interest such as Bacup, the Borough potentially has broad visitor appeal. There are also emerging initiatives to market the Borough as a destination for more active sports. New mountain bike trails have recently opened on the moorland above Bacup and there is an existing dry ski slope known as 'Ski Rossendale'. Rawtenstall is the Northern terminus for the East Lancashire heritage railway and there are new paths opening, including a bridleway. Combined with improved marketing, these initiatives and facilities have the potential to stimulate growth in tourism activities, particularly a greater number of day visitors. Overall, moderate growth in tourism activities appears possible, but would not be likely to generate significant demand for employment space.

6.32 **Retail/Leisure:** The three main town centres within the Borough – Rawtenstall, Hastlingden and Bacup – are minor retail and leisure centres within Pennine Lancashire, and representation of these sectors within Rossendale is lower than average. Furthermore, Rossendale's visitor economy is valued at just £65

[32] Rossendale Economic Strategy, 2008-2011

million and has fallen in recent years[33]. However, employment in these sectors has grown more rapidly than the regional average in recent years, albeit from a low base. The towns suffer from low catchment populations and significant expenditure leakage to the higher order centres in the surrounding area, including Bury, Blackburn and Manchester.[34] Furthermore, Rossendale does not have a large housing allocation that could significantly increase the resident population and demand for retail and leisure services[35]. The 2005 Retail Capacity Study identified scope to expand the Borough's retail floorspace by a modest 5,400 m^2 by 2011, which could be met by redevelopment of the 'Valley Centre' shopping precinct in Rawtenstall and an additional food store for Bacup. The Retail Study has recently been updated (2009). The updated Retail Study indicates that there is no global capacity for additional convenience floorspace in the Borough, even by 2024. In terms of comparison floorspace, the study identifies a requirement for additional comparison floorspace after 2013 (and potentially sooner should not all committed and proposed developments come forward). In terms of leisure floorspace, the study identifies that the potential catchment population is sufficient to support some new small-scale commercial leisure uses, although in reality the strength of competing facilities is likely to restrict the scope for larger scale commercial leisure uses. The key potential areas for improved facilities are for additional class A3 (restaurants and bars) uses. The development of the tourism and leisure offer in the Borough may also result in increased visitor numbers and generate some additional expenditure and employment in this sector. However, overall, it is reasonable to expect low to modest retail and leisure growth.

6.33 **Hotels / Catering:** Rossendale's representation in this sector is currently slightly below average, but with growth above the regional trend. The Borough's retail study noted that there is scope for the provision of an increased amount of bar and restaurant space within the town centres, and this could increase employment provided that it is not at the expense of the provision of retail space. It is also reasonable to expect that improvements to the overall tourism appeal of Rossendale through initiatives such as the Adrenaline Gateway may generate some modest growth in the hotel sector and evening economy. Overall, modest growth of this sector appears likely but would again be unlikely to generate significant demand for B class premises.

Rossendale's Future Economic Role

6.34 Drawing on this review, Rossendale appears likely to remain largely reliant on its industrial sectors, although these are likely to face continuing decline in employment and space needs, even if they continue to be more resilient than the regional trend. Consolidation and modest growth in manufacturing will rely

[33] Rossendale Economic Strategy, 2008-2011
[34] Rossendale Retail Capacity Study, 2005 – updated 2009
[35] Note: The recent SHLAA undertaken by Roger Tym and Partners (February 2009) for RBC indicates that the no. of dwellings from outstanding planning permissions in Rossendale is insufficient to meet the RSS requirements. As such, there will be a need to allocate land for housing in order to meet the shortfalls against the 5, 10 and 15-year RSS dwelling targets, of 413 dwellings, 1,380 dwellings and 2,490 dwellings respectively. However, the SHLAA demonstrates there is sufficient good quality potential housing land to meet these targets.

on greater specialisation and higher value, higher technology products while only low growth in locally based distribution appears likely.

6.35 Some modest growth in its service sector appears possible, whilst promotion of the Borough as an 'Adrenaline Gateway' could generate some niche opportunities for enterprises related to outdoor pursuits, as well as the visitor economy more generally. However, most of the growth is likely to come outside of the B-class uses.

6.36 The above analysis identified very few sectors where anything more than low growth could be anticipated and no obvious areas of particular strength. More generally, the Borough's relative remoteness, small population, lack of a clear image as a business location and competition from surrounding areas suggest that attraction of large-scale office and industrial relocations is unlikely. In addition, there are no obvious factors, within or around Rossendale, that appear likely to produce a step change in Rossendale's current economic prospects.

6.37 Table 6.1 below summarises the economic growth potential of the different sectors within Rossendale based on the above analysis.

Table 6.1 Summary of Future Growth Prospects in Rossendale by Sector

Sector	Current Representation	Future Growth Potential
Financial Services	Low	Low
Business Services	Low	Low / Moderate
Distribution	Moderate	Low
General Manufacturing	High	Low
Advanced Manufacturing / Engineering	Moderate	Low
ICT	Low	Low / Moderate
Environmental Technologies / Energy	Low	Low
Healthcare / Biotechnology	Low	Low
Creative Industries / Media	Low	Low
Construction	High	Low
Tourism-related Sectors	Low / Moderate	Moderate
Retail / Leisure	Low / Moderate	Moderate
Hotels / Catering	Low / Moderate	Low/Moderate

6.38 To capitalise on the relatively few future areas of growth and help deliver a sustainable economy, a balance is needed between encouraging more indigenous growth within Rossendale and trying to increase the current very low amount of inward investment and relocations. The aim would be to broaden the area's economic base and create a range of employment opportunities for local residents in different sectors and at a range of skill levels. Alternative options, such as providing substantial new office space in an effort to expand the Financial and Business sector, would result in Rossendale competing against more established centres nearby. In the short to medium term at least, following the continued fall out from the recession, the focus for the Borough should be towards consolidation and enhancement of existing strengths and indigenous businesses.

6.39 This suggests the need for greater emphasis on making provision for small and start-up businesses, and encouraging local business start-ups as well as facilitating expansion by established firms. Despite modest demand in Rossendale at present, there is some evidence that making available good, competitively priced sites/premises can stimulate demand and attract firms from nearby areas. The general attractiveness of the Borough for small to medium sized enterprises (SMEs) in sectors such as business services and ICT could also be enhanced by providing some attractive, lower cost sites and premises, including a business 'incubator'[36]. Provision of good quality, competitively priced, office premises, perhaps in converted buildings with heritage interest, may also be attractive to some sectors although such premises may not be delivered by the private sector. Such initiatives may encourage local start-ups by Rossendale residents attracted by its natural environment and high quality of life, but who currently commute to jobs outside the Borough.

[36] Business 'incubator space' is taken to refer to serviced units developed to support the kinds of start-up businesses that will provide new jobs in a local area. In the process, they are intended to provide new and vulnerable businesses assistance by offering knowledge, connections and flexibility. Support for incubators often comes from chambers of commerce and local authorities, and they are often affiliated with higher and further education institutes.

7.0 Future Employment Space Projections

7.1 This section assesses the amounts of additional employment space likely to be required in Rossendale Borough up to 2026. It also considers the types of space required. It is important to emphasise that existing commitments are not taken into account and this assessment does not, therefore, represent the amount of additional sites required.

7.2 To estimate the broad scale and type of further employment land required, a number of different indicators and factors have been considered. The principal approaches most commonly used when assessing future employment land needs are based on:

- forecasts of employment growth in the main B class sectors;
- projecting forward past take-up trends of employment land, with adjustments (if necessary) to reflect changing economic conditions; and
- considering future growth of local labour supply and the amount of jobs and employment space that this can support.

7.3 All these approaches have their limitations and need to be considered together, alongside other indicators, to provide a robust view of future employment space needs. In addition, and particularly given the current recession and economic uncertainty, the economic growth potential and likely demand for employment space in Rossendale needs to be assessed under different future scenarios. Possible economic futures could include current trends continuing, lower economic growth than in the past to reflect the current international downturn, increased levels of out-commuting or, conversely, a more optimistic view of Rossendale's economy based on opportunities to reduce levels of out-commuting.

Factors Affecting Future Employment Space Needs

Econometric Modelling Methodology

7.4 It is recognised that the previous ELR undertaken for Rossendale in 2007 used Experian employment forecasts for Lancashire County from 2003-2016, calculating Borough-level growth by deriving employment by sector in Rossendale and applying this as a proportion of county-wide growth.

7.5 The foundation for the economic modelling for this study is, however, based upon a bespoke baseline economic model for Rossendale, produced by Experian Business Strategies. This provides an employee growth forecast for 2008-2026 for Rossendale borough as derived from their November 2008 model-run.

7.6 In order to calculate potential employment land projections, it was necessary to categorise the level of employment change forecast for the Borough, for office, industrial, and wholesale/distribution uses as follows:

- The office floorspace requirement is related to job growth/decline in the financial and business service sectors (i.e. Business Services, Banking and Insurance and Other Financial and Business Services);
- The industrial floorspace requirement is related to job growth/decline in the manufacturing sectors; and
- The wholesale/distribution floorspace requirement is related to job growth/decline in the three SIC sectors of wholesaling, transport and communications[37].

7.7 Given the differing pictures indicated by the employment-based estimates and past take-up trends, a range of other indicators have been reviewed to inform a judgement on where the best estimate of future needs should lie. Consequently, a series of alternative scenarios were modelled from the Experian November 2008 baseline projections. These alternative scenarios are based, in part, on changing timescales and severity of the recession, as well as a possible change in commuting patterns of residents of Rossendale. These are discussed in more detail below.

7.8 In order to calculate employment land projections, employment densities (as recommended in the English Partnerships 2001 Guidance Note[38]) and plot ratios by use class were then applied to the job change figures to translate these into employment land projections. It was assumed that:

- One 'office' job requires 19sqm of employment floorspace;
- One 'industrial' job requires 34sqm of employment floorspace; and
- One warehousing/distribution job requires 50sqm of employment space.
- It has been assumed that a gross area of 1ha is required to develop 4,000sqm of office, industrial or warehousing/distribution space.

7.9 The vacancy rate has been calculated separately, using the most recent vacancy rate for industrial premises published by the Valuation Office (15% at 2004/2005, compared to 10% for the North West Region and 9% for England as a whole). This was then applied to the employee-based floorspace figures to present an approximation of the existing situation.

[37] It should be noted that the three categories relating to warehouse/distribution issues include a wide number of activities which operate in different types of space that would not normally be defined within this category (e.g. SIC4 'taxi operators' are included within the general 'transport' SIC2 employment category, but clearly do not operate out of warehouse-type units). A detailed analysis of the most recent SIC 4 data from the ABI statistics database for 2007 indicates that across Rossendale, 41.2%, 68.6% and 75.6% of jobs in the wholesaling, transport and communications categories, respectively, are considered to contribute to the need for warehouse/distribution employment land. On this basis, the data for these three industrial classifications were reduced, by approximately 46% (which is the figure resulting from a detailed analysis of the SIS 4 data), to remove non-'B8' (warehousing/distribution) based uses from the statistics. It was assumed that this proportion remains relatively constant over the study period.

[38] English Partnerships (2001), Employment Densities: A Full Guide

7.10 In order to calculate a future vacancy rate for each of the scenarios, assumptions had to be made regarding the 'ideal future' scenario that the Borough might aspire towards. In particular, there will always need to be a certain proportion of vacant premises in order to allow for the smooth operation of the market. However, high vacancy rates are undesirable in the long term, raising the question of whether we should be planning to provide new employment sites if there is already a substantial amount of under-utilised premises, particularly with regards the high number of vacant mills with specific development challenges in the Borough.

7.11 Consequently, the study not only planned for a reduction in occupied land due to continuing industrial decline but also for a fall in the existing total of vacant premises to bring it in line with the minimum required for proper operation of the market. For the future employment scenarios, 'ideal' vacancy rates of 10% for office, industrial, and storage & distribution were used.

7.12 The demand projections generated via this employment forecasting method represent a net future requirement for employment levels and do not take into account any future losses to non-employment uses. It is therefore necessary to adjust these figures in order to reconcile them against gross projections generated by analysing historic take up rates.

Past Take-up Rates – Results

7.13 The take-up of industrial space in Rossendale has been obtained from the Borough Council for 2005-2008 and from the 2007 Rossendale ELR, prepared by King Sturge, for 1995-2006.

7.14 The 2007 ELR indicates that, in the 11 years between 1995 and 2006, 10.6ha of allocated employment land had been taken up for employment development, which equates to approximately 1ha per year.

7.15 The data provided by the Council (which accounts for the take up rate of both allocated and non-allocated employment land in the Borough) indicates that 6.5ha employment space was completed in the 2005-2008 period, after plot ratios for B1, B2 and B8 space is applied. This equates to an average of 2.15ha per annum between 2005 and 2008.

Figure 7.1 Take up rates (ha) within Rossendale 2005-2008 (excluding Madison Centre Office Refurbishment)

7.16 In terms of the type of employment space completed in Rossendale in the 2005-8 period, the majority has comprised B2 floorspace (4.7ha/73%). Only 0.1ha (1%) was accounted for by the development of B8 space and 1.7ha (26%) for new B1 floorspace.

7.17 Consequently, factoring in the most recent employment land take up alongside the data collected by King Sturge for the 11 year period could suggest an average annual take up of around 1.25ha (i.e. 17ha over a 14 year period).

7.18 At a very basic level, projecting this take up rate of 1.25 ha per annum (see para. 7.17 above) forward to 2026 could suggest a requirement for around 22.5ha of land, biased towards B1c/B2 manufacturing. It is recognised that this presumption is based on a limited data source and does not factor in the likely impacts of a prolonged recession, which could reduce take-up significantly in the short to medium term. Alternatively, taking the 1ha per annum figure (see paragraph 7.14 above) used in the King Sturge report would suggest a requirement for around 18ha of land. The above results in **a range of between 18ha - 22.5ha required over the period to 2026** (based on range of 1ha-1.25 ha per annum).

Employment Growth

7.19 Experian's November 2008 forecasts of employment growth for Rossendale were modelled as part of the econometric projections. Such forecasts tend to be most reliable at regional and national scales than at the local economy level, but can indicate the broad scale and direction of economic growth in different sectors and provide some guidance to assess future land requirements.

7.20 It is important to recognise that there is not always a clear cut relationship between employment change and employment land needs. Additional employment space can be needed even if employment itself is falling, for example if a manufacturing firm requires more space to enable greater automation and achieve job reductions through productivity gains.

7.21 The November 2008 projections for Rossendale indicate that overall, there will be weak growth in employment overall across the 30 defined sectors for the period 2008-2026, with the manufacturing and education sectors anticipated to experience the greatest decline. In particular, 'other manufacturing' (including sub-sectors such as recycling and manufacture of furniture) is forecast to decrease by 897 jobs between 2008 and 2026; education is forecast to decline by 521 jobs by 2026, and the textiles and clothing sector is projected to decline by 473 jobs.

7.22 Conversely, it is anticipated that a number of sectors will experience growth in employment in the Borough over the same period (2008-26), with the greatest growth being experienced in the business services (757 jobs); distribution (685); hotels and catering (476); and financial & business services (633) sectors[39].

7.23 Table 7.1 sets out the projected change in employment within the B-class categories in the period 2008-2026 for the November 2008 Experian baseline scenario. Overall, Experian forecast that there will be a slight reduction in employment within these sectors as a whole to 2026 (less than 1% of the total employment).

[39] Whilst the numbers relating to business services and FBS combined seem relatively high in the Rossendale context (1,390 employees) it is worth stressing that this net growth relates to an 18-year growth period – the Greater Manchester Forecasting model forecasts undertaken in November 2008 project a growth in similar B1-related employment by 15,810 over the same time period (source: Manchester City Employment Land Review 2009)

Table 7.1 Employment Growth Forecast 2008-2026

	Office	Industrial	Storage / Distribution	Total
Projected Employment Change 2008-2026	632	-924	197	**-95**
% Employment Change 2008-2026	12.02	-22.01	10.09	**-0.8**

7.24 The greatest employment growth is forecast to be experienced by those office sectors, at 12%, whilst manufacturing employment in Rossendale is anticipated to decline considerably between 2008 and 2026. Employment within the wholesaling and distribution sectors is forecast to experience a growth in employment between 2008 and 2026 by around 10%.

7.25 It should also be noted that whilst econometric forecasts can provide a good indication as to the likely future requirements for employment space, some degree of caution needs to be applied, due to the unpredictability of market circumstances and the considerable influence of external factors on the local economy.

Growth Scenarios

7.26 Four alternative growth scenarios have been modelled, adapting the base November 2008 Experian Growth forecasts in the following ways:

- **Scenario 1: Severe recession in the short/medium term:** This scenario factors in Experian's revised January 2009 unemployment and GDP growth projections to present a more pessimistic view of economic growth in the Borough in the short to medium term. Under this scenario, growth contracts by 3% in 2009, with unemployment reaching levels of 10% in 2010/11. This scenario still assumes business as usual in the long term, however.
- **Scenario 2: Long term depression in Business Services:** This scenario moderates Experian's forecast growth in the Business Services sector in the long term. This scenario assumes that the 'credit crunch' currently being experienced by the UK economy fundamentally alters the long term growth and access to finance of certain sectors of the economy, specifically Business Services;

- **Scenario 3: Reducing Out Commuting:** Rossendale Borough has relatively high levels of out-commuting, with around 13,935, or 47%, of residents of working age leaving the Borough to commute elsewhere for work, a figure significantly higher than many of the comparable districts nearby. Reducing this high level of out-commuting could contribute significantly towards facilitating sustainable communities in the Borough. There is the potential to reach this goal (albeit largely outside the control of RBC) through a combination of improved job opportunities in the Borough and increased penalties for car travel (e.g. higher fuel costs, severe congestion on the M60 into the regional centre or congestion charges), which could encourage more residents to work locally. Consequently, this aspirational scenario was modelled on the assumption that levels of out-commuting from Rossendale Borough could be reduced from around 47% to 35% between 2008 and 2026. This reduction is considered to be achievable and would bring it in line with out-commuting rates for a number of authorities nearby including Calderdale (25.5%), Kirklees (29.6%) Pendle (36%) and Blackburn (29%). This increased level of employment locally (in the order of 3,500 additional employees, achieved by providing more land for employment purposes) has been factored into the base Experian employment projections on a pro-rata basis over time; and
- **Scenario 4: Increasing Out Commuting:** As noted above, Rossendale Borough has relatively high levels of out-commuting. Whilst Scenario 3 has explored the implications of a reduction in levels of out-commuting, this final scenario models the other extreme: increasing commuting levels. Such a scenario would represent a continuation of current trends towards higher rates of commuting and would reflect an increased dependency on nearby urban centres for employment, specifically Manchester City Centre. It is recognised that such a scenario would have a number of negative outcomes for Rossendale, not least from a sustainability perspective. The scenario would effectively result in Rossendale becoming a ‘commuter borough’, with a renewed emphasis on the provision of good quality housing and community facilities. Nevertheless, this economically pessimistic view of the future is an option that the Council may wish to follow, given the challenges involved in providing good quality employment space in the Borough. Other similar rural districts in close proximity to large urban centres elsewhere in England have taken on a similar ‘commuter borough’ role; 70% of working residents in Chester-le-Street in County Durham, for example, travel beyond the District boundaries for work, whilst the comparable out-commuting rates for Bromsgrove and Solihull in the West Midlands are 59% and 52% respectively. Consequently, this pessimistic scenario has been modelled on the assumption that levels of out-commuting increase from around 47% to 60% between 2008 and 2026. This would significantly reduce the level of employment locally (in the order of 3,940 fewer employees) and this has been factored into the base Experian employment projections on a pro-rata basis over time in a similar manner to Scenario 3.

7.27 Figure 7.2 illustrates the change in total employment growth over time, whilst Table 7.2 presents the level of B1, B2 and B8-related employment change forecast over the period 2008 to 2026 for Rossendale Borough under the four growth scenarios and baseline projection. It is apparent that whilst Scenario 1 appears to differ little from the baseline projection in terms of overall employment growth over the 18 year period, this masks the effects of the recession in the short term, as illustrated in Figure 7.2. The protracted economic decline presented in Scenario 2 (as shown by the green line in Figure 7.2) illustrates the extent to which the local economy is likely to be reliant upon the Business Services sector to drive future growth.

7.28 The economic implications of seeking to encourage/discourage levels of out-commuting are graphically illustrated by the starkly contrasting fortunes of Scenarios 3 and 4; the former option represents the most optimistic modelled and is aspirational, rather than demand based. Under this scenario, the provision of new space in suitable locations would increase the level of take up and result in a step-change in job creation. In contrast, by encouraging increased levels of out-commuting to places such as Manchester City, Scenario 4 involves a dramatic reduction in the amount of local jobs provided and hence the amount of employment land required; this scenario would clearly represent the most pessimistic scenario modelled.

Fig 7.2 Total Employment Growth Projections 2008-2026

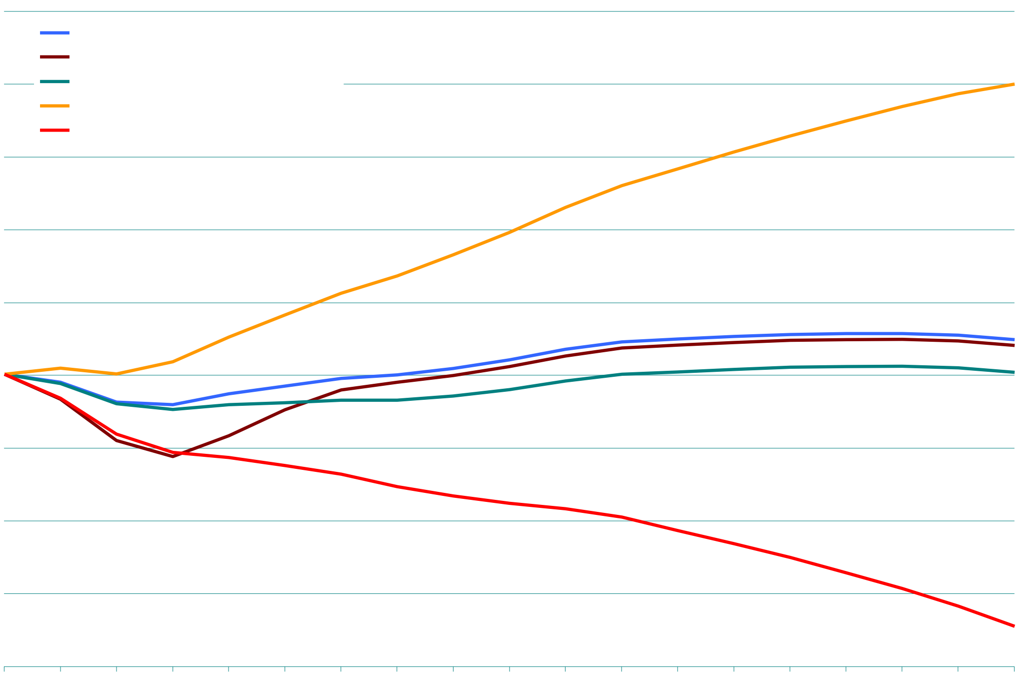


Table 7.1 Scenario Net Employment Growth Projections 2008-2026

	Office Employment Growth	Industrial Employment Growth	Storage / Distribution Employment Growth	Total B-Class Employment Growth
Base Projections	632	-924	197	**-95**
Scenario 1: Severe Recession (short-medium term)	616	-937	192	**-130**
Scenario 2: Business Services depressed (long term)	182	-924	197	**-545**
Scenario 3: Reducing out-commuting	1,328	-368	455	**1,415**
Scenario 4: Increasing out-commuting	-150	-1,548	-93	**-1,791**

Employment Space / Land Projections

7.29 As noted earlier in this section, it is necessary to adjust the net employment forecasting figures in order to reconcile them against gross projections generated by analysing historic take up rates. For example, even where the identified demand for employment land is likely to decrease, there should always be some new development coming forward to avoid stagnation and further decline in the market. Consequently, it is desirable to allocate more land than is likely to be used, as some land may not come forward for development in the short to medium term (if at all). This is particularly the case for those sites which have been carried over from past plan periods and those with significant constraints to overcome.

7.30 It is standard practice to allow for a degree of flexibility, or 'margin of choice', in the allocations by applying a stated factor in the demand calculations. As such, positive referenced projections were adjusted by a factor of 20% (broadly equal to around 1.5 years worth of recent past take up, c.3ha) whilst in those instances where net demand is forecast to be negative, the projected decline was reduced by 20%. This is considered to be an appropriate margin of choice on the basis that this allows for flexibility in terms of the likely 1-2 years lag between the grant of planning permission and the implementation of the scheme, and would avoid an oversupply of employment land in the Borough.

Consequently, following the calculation of the employee breakdown for office, industrial and warehouse/distribution categories for the various quantitative scenarios in Rossendale Borough, standard employment density and plot ratios were applied to translate the figures into floorspace and land, with vacancy rates applied to allow Rossendale to plan for reducing the amount of vacant stock in the area whilst still maintaining a healthy level of 'churn'. As stated above, a 'margin of choice' was incorporated into the projections.

7.31 Table 7.4 and Fig 7.3 provide a summary of the future demand for employment land in Rossendale for the three broad categories, as identified by each of the scenarios considered. They indicate that the net demand for office land is forecast to increase over the study period under three of the five scenarios, with the Borough projected to require between –1.8ha and 6.7ha over the period to 2026 (incorporating a margin of choice).

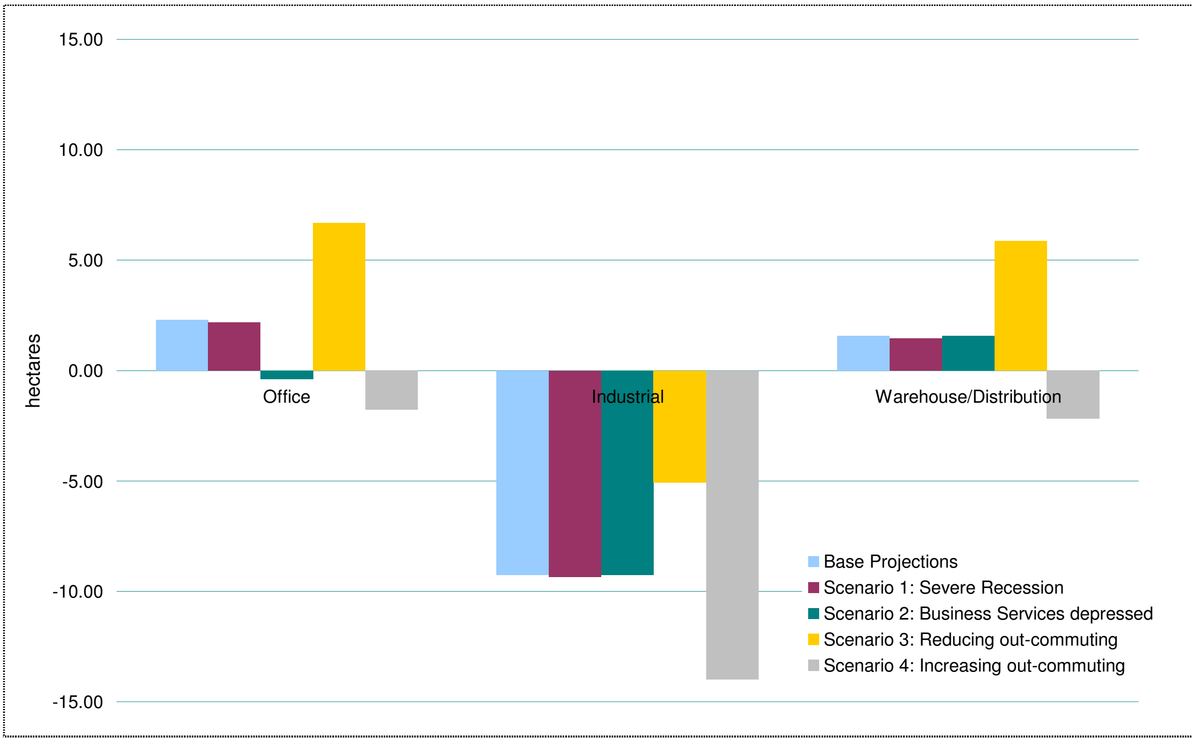
7.32 The projected need for wholesale and distribution land is forecast to be similar, ranging from -2.2ha (Scenario 4) to 5.9ha (Scenario 3) over the period to 2026.

7.33 In contrast, the net demand for industrial land is anticipated to be negative for all of the scenarios. Over the period to 2026, the need for industrial land is forecast to decline by between -5.1ha (Scenario 3) and -14.0ha (Scenario 4).

Table 7.1 Employment Land Projections 2008-2026 Incorporating a Margin of Choice (hectares)

	Office		Industrial		Warehouse / Distribution		Total	
	2008-26	With Margin	2008-26	With Margin	2008-26	With Margin	2008-26	With Margin
Base Projections	1.9	2.3	-11.6	-9.3	1.3	1.6	**-8.4**	**-5.4**
Scenario 1: Severe Recession (short-medium term)	1.8	2.2	-11.7	-9.4	1.2	1.5	**-8.7**	**-5.7**
Scenario 2: Business Services depressed (long term)	-0.5	-0.4	-11.6	-9.3	1.3	1.6	**-10.7**	**-8.1**
Scenario 3: Reducing out-commuting	5.6	6.7	-6.3	-5.1	4.9	5.9	**4.1**	**7.5**
Scenario 4 Increasing out-commuting	-2.2	-1.8	-17.5	-14.0	-2.7	-2.2	**-22.4**	**-17.9**

Fig 7.3 Employment Land Projections 2008-2026 Incorporating a Margin of Choice (hectares)



Planning Requirement for Employment Land

7.34 As noted earlier in this section, it is standard practice to produce net employment land projections through the use of Econometric Modelling. However, for planning policy purposes, it has been necessary to convert these figures into a gross requirement. A rough approximation of gross change has been calculated through an allowance for leakage, or the amount of employment land lost to alternative uses. It should be noted that the net figure is more robust than the gross figure as a variation in leakage rates can substantially affect the gross figure.

7.35 Rossendale Borough Council's Annual Monitoring Reports for the period 2004-2008 indicate that a total of 11.8 hectares of employment land has been lost to alternative uses. Table 7.4 indicates that, based on the information available, much of the land lost between 2006 and 2007 had been used for storage and distribution purposes. The 2004-05 AMR further states that the loss of employment land predominantly resulted from the conversion of former Mill buildings within the urban boundaries of the Borough (e.g. Ilex Mill).

7.36 This equates to an average of 2.95 hectares of land lost per annum from the Borough. This figure is considerably higher than the amount of land that has been developed for employment uses over the last 13 years, which has averaged around 1.0-1.25 hectares annually.

Table 7.2 Summary of Total Employment Land Lost to Alternative Uses 2004-08 (hectares)

	Office	Industrial	Warehouse / Distribution	Total
2004-05	-	-	-	**3.9**
2005-06	-	-	-	**1.8**
2006-07*	0.5	0	3.1	**3.6**
2007-08*	0.5		2.0	**2.5**
TOTAL				**11.8**

Source: Rossendale Borough Council Annual Monitoring Reports 2005-2008

*Note: figures for 2006/07 and 2007/08 have been calculated by converting floorspace figures to land by applying a 40% plot ratio.

7.37 If this level of losses were to continue at recent levels, at a simple level, some 53.1 hectares would need to be provided over the 18 year plan period just to maintain the current employment land stock. There are, however, a number of reasons why it is unlikely that the previous high rate of losses will be maintained for the foreseeable future. For example, it is likely that most of the 'easier', or more attractive, former employment sites have already been re-developed for other uses. Much of the remaining stock of employment land is likely to be constrained to varying degrees, and is less likely to come forward. In addition, the current recession and, in particular, the collapse of the housing market has made it less attractive for landowners to pursue 'higher-value' developments on employment sites. This is particularly the case for the former mill buildings which comprise much of the older employment land stock in the Borough. Falling house prices and the glut of apartment schemes in the area are likely to ensure that converting mill buildings to residential uses are less viable in future years. There may also be some justification behind the statement that Rossendale needs to lose some employment land because it has too many poor quality sites. As such, it is considered that it would be reasonable to assume that future losses proceed at a figure equal to approximately half past rates.

7.38 Consequently, applying an annual rate of 1.48 ha losses per annum to the net projections would result in indicative total gross land requirements to 2026 as follows:

- Baseline Projections: 21.13ha;
- Scenario 1 - Severe recession (short to medium term): 20.84ha;
- Scenario 2 – Business Services depressed (long term): 18.47ha;

- Scenario 3 – Reducing out-commuting: 34.04ha;
- Scenario 4 – Increasing out-commuting: 8.61.

Reality Check

7.39 It is useful to compare the reasonableness of these estimates by comparison with past trends and previous employment land allocations for Rossendale.

7.40 The base projection and three of the four econometric model scenarios estimate a negative net employment land requirement which, given that as at April 2009, there was an estimated 17.8ha of allocated employment land recorded as being available in Rossendale, would necessitate substantial de-allocations. However, as noted in Section 4.0, the need to plan for a net loss of employment land may be appropriate, given that over the last three years, approximately 2.2ha of new employment space has been provided annually, against annual losses of employment space equal to 3.0ha.

7.41 The estimates of land requirements will clearly be sensitive to the various assumptions used. The job/floorspace ratios and plot ratios adopted here reflected those in ODPM guidance[40]. At present, it is assumed that the plot ratio[41] of 40% is applied across the three different types of employment space. If, however, the majority of office space coming forward over the plan period was relatively small scale and located predominantly in the Borough's town centres, this could reduce the plot ratio substantially. However, even assuming that approximately half of the office space coming forward in the Borough was located in town centres at a plot ratio of, say, 150%, this would make only a small difference (a maximum of 2.5ha) to overall land requirements (ranging from 9.3ha to 31.6ha in total).

7.42 Another more significant assumption in terms of sensitivity is the 20% safety margin added. A higher margin of, say, 50%, would increase the maximum land requirement by approximately 3ha. However, the 20% figure is considered the most appropriate here given the uncertainty of development rates, the relatively low rates of past take up and the need to avoid a significant over-supply of space in the current economic climate.

7.43 In terms of considering the future growth of the local labour supply to test the amount of jobs and employment space that this can support, ONS population forecasts (published in 2008) indicate an increase of approximately 2,350 economically active Rossendale residents by 2026 (an increase of about 11%). Typically (based on national figures), only about 45% of these workers will work in B class jobs and this would mean about 1,050 'B class' workers. However, based on current out-commuting patterns, some 47% of these workers might be

[40] Employment Land Reviews Guidance Note, ODPM (2004)
[41] A plot ratio is the total building square footage (building area) divided by the site size square meterage (area of the plot). Therefore, a plot ratio of 150% would indicate that the total floor area of a building is 1.5 times the gross area of the plot on which it is constructed. For practical purposes, this would equate to a 3 storey building with fifty percent plot coverage, the remaining plot area being occupied, for example, by access roads, parking and landscaping. A plot ratio is 40% is used in accordance with the industry standard practice and IDPM Guidance 2004.

expected to seek jobs outside of Rossendale, leaving approximately 560 needing local jobs (although it should be noted that some of these jobs would be filled by in-commuters). From these figures, which include a generous safety margin, it appears that the baseline gross employment land requirements would not put pressure on the local labour supply.

7.44 Lastly, it is worth comparing the projections with a projection forward of gross annual take up rates in Rossendale over the last 13 years. This would produce a requirement for between 18-22.5 hectares of general employment land. As noted above, it is not considered appropriate to base future needs on gross development rates, partly because they do not take account of some existing employment sites being redeveloped for employment uses without an additional land requirement. Nevertheless, by factoring in the potential loss of employment sites to the net econometric scenario projections, it is apparent that the low end of the take up projections (18ha) is almost identical to Scenario 2, predicated on the long term slump in the business services sector, which projects a requirement for 18.47 gross. The base econometric and Scenario 1 (severe recession) projections, at 21.13ha and 20.84ha respectively, closely match the top end of the take up rate projection of 22.5 hectares. Only Scenario 3, the aspirational scenario, would appear to suggest a gross requirement out of line with what has been achieved in the recent past. In this case, past take up would have to increase by almost 55% to achieve the 34.04ha required under this scenario.

7.45 In summary, the range of forecasts of net employment space requirements, with the 20% safety margin incorporated, is considered to provide an appropriate basis for future planning taking account of the various uncertainties involved.

Conclusions

7.46 Based on the consideration of various factors (including econometric projections and past levels of take up), estimates of future employment space requirements have been prepared for various scenarios of future economic development in Rossendale. Four of these estimates (including baseline) assume less positive economic conditions nationally than in the recent past, whilst the reducing out-commuting scenario allows for higher growth in the Borough to reflect the possible stimulus of providing residents with greater encouragement to work closer to home, although largely based on factors outside of the Borough Council's control.

7.47 The space requirements related to these different futures range from -17.9ha (net), which would require substantial de-allocations, to 7.5ha (net). It is therefore clear that the extent of employment land to be provided over the 18 year plan period depends greatly upon the policy choices made by Rossendale Borough Council. If, however, past losses of employment land to alternative uses are factored in (assuming future losses of half past rates), the amount of employment land required to be allocated could range between 8.61ha to 34.04ha (gross).

7.48 Given an uncertain economic outlook, it is difficult to select the preferred or most likely option to occur from these alternative growth pictures. The lower growth scenarios would appear to have merit, given that even in the recent boom years Rossendale was achieving relatively low rates of take up, with losses exceeding new developments in recent years. These (gross) scenarios also provide a close fit with past take up rates projected forward 18 years. The higher growth forecast resulting from the reduced out commuting scenario indicates a more aspirational target that would depend on stimulating the local economy in various ways and specifically through the provision of high quality accommodation in areas of pent-up demand (predominantly to the west of the Borough, around the A56/M66 corridor). However, following such a scenario would require around 55% more land to be developed annually than has been achieved in the recent past and the likelihood of such growth is at best uncertain, dependent mainly on decisions made by Government and the Greater Manchester authorities, fuel duty and congestion charging etc.

7.49 Nevertheless, from the discussions with commercial agents and developers, there is some qualitative evidence that making available good, competitively priced sites/premises could stimulate demand in the medium to long term, with a particular gap identified for small industrial and office space.

7.50 The focus should therefore be upon improving the quality of the current portfolio in areas of higher demand, providing some attractive, lower cost sites and premises, including a business incubator. As noted earlier in this report, the provision of good quality, competitively priced, office premises, perhaps in converted buildings with heritage interest, may also be attractive to some sectors although such premises may not be delivered by the private sector. Such initiatives may encourage local start-ups by Rossendale residents attracted by its attractive natural environment and high quality of life, but who currently commute to jobs outside the Borough.

7.51 On balance, it appears sensible for planning purposes to use the quantity of employment land estimated under Scenario 1 (Severe Recession: short-medium term), which factors in the impacts resulting from a worsening economic situation, but which nevertheless projects a return to 'business as usual' in the long term. **This would result in a net requirement of -5.7ha, and a gross requirement of 20.84.**

7.52 The necessary balance between the supply of and demand for employment sites is discussed in detail in Section 8.0.

8.0 The Demand / Supply Balance

8.1 This section draws together the forecasts of future employment needs and the appraisal of current and allocated supply of employment sites to identify any need for more provision, or surpluses of land, in both quantitative and qualitative terms.

Quantitative Balance

8.2 The previous section identified a need for between 8.61ha and 34.04ha (gross) of employment land between 2008 and 2026, including a reasonable safety margin to provide adequate choice and flexibility. These figures also sought to address the high levels of employment land lost to alternative uses.

8.3 Currently available land in Rossendale to help meet this identified future need is identified in Section 6.0. This indicates that there are now 8 allocations with remaining land (some of which also have extant permissions for B1, B2 and B8 uses) equal to 17.1ha, with a further 1.6ha of land on 6 non-allocated sites with extant permissions for employment use. Consequently, Rossendale has a committed forward supply of employment land equal to **18.7ha**.

8.4 However, it is not certain how much of the current recorded supply is readily available for development or requires intervention to bring it forward. For example, a number of the sites are not being actively marketed for employment uses, or have development constraints that may delay them coming forward for employment development. In addition, a number of the sites are located in areas that would potentially suit alternative uses such as residential or leisure.

8.5 At a very basic level, and putting aside qualitative issues at this stage, comparing estimated demand with supply in 8.1 implies that for four of the five growth projections modelled, there is a reasonably close match between the demand/supply balance (should the undeveloped sites come forward for development and are suitable and developable for the uses required). Under the aspirational 'reducing out-commuting' scenario, however, there would be a shortfall of around 15.3 hectares.

Table 8.1 Demand/Supply for Employment Space 2008-26 (hectares)

	Base Projections	Scenario 1 Severe Recession	Scenario 2 Business Services Depressed	Scenario 3 Reducing Out-Commuting	Scenario 4 Increasing Out-Commuting
Requirement for B-class space (net)	-5.4	-5.7	-8.1	7.5	-17.9
Requirement for B-class space (gross)	**21.1**	**20.8**	**18.5**	**34.0**	**8.6**
Committed supply of employment space	18.7	18.7	18.7	18.7	18.7
Surplus / (Shortfall)	(-2.4)	(-2.1)	0.2	(-15.3)	10.1

8.6 As noted in Section 7.0, the lower growth scenarios would appear to have merit, given that even in the boom years Rossendale was achieving relatively low rates of take up, with losses exceeding take up. In contrast, Scenario 3 represents a more aspirational target that would depend on stimulating the local economy through the provision of high quality accommodation in areas of pent-up demand.

8.7 The analysis in previous sections of this report has indicated that we are unlikely to see a step change in land requirements in the Borough. Very few industrial sectors have been identified where anything more than low growth could be anticipated, and there are no obvious areas of particular strength. Given the Borough's relative remoteness, small population, modest office market and competition from surrounding areas, it is suggested that demand (particularly away from the A56/M66 corridor) is likely to centre around indigenous growth, with low levels of inward investment and relocations from elsewhere. Even under the most positive scenario, the attraction of large-scale office and industrial relocations is unlikely, and structural manufacturing decline is expected to continue.

8.8 As summarised in Section 7.0, it therefore appears sensible for planning purposes to use the quantity of employment land estimated under Scenario 1, which would result in a net requirement of -5.7ha, and a gross requirement of 20.8, factoring in the 20% margin of choice. **This would indicate a modest shortfall of some 2.1ha of employment land, in quantitative terms at least**.

8.9 As noted above, achieving this 'target' of development will be dependent on a number of factors including adequate local labour being available, potential enabling development on mixed use sites; site constraints being unlocked to facilitate future development; and the area being able to attract more businesses in the future.

Qualitative Factors

8.10 Ensuring an adequate choice of location and types of sites is also important even if there appears to be an adequate supply in quantitative terms. This is necessary to meet the needs of different employment uses and the aims for higher value employment, as well as providing a reasonable choice of types of site in different locations spread throughout Rossendale, given the distinct markets therein.

8.11 As noted in Section 4.0, most demand for employment premises in the Rossendale area is for industrial premises (which includes both manufacturing and distribution uses), and levels of demand have been strong and steady for a number of years. It is understood that the greatest demand is for smaller industrial units under 464 sqm (5,000sqft) and particularly for sites between 94 and 279sqm (1,000 – 3,000 sq.ft), which reflects the existing supply of sites in the Borough. Small scale distribution firms are also attracted to Rossendale seeking low cost sites.

8.12 In contrast, the commercial office market in Rossendale is very localised and is focussed around Rawtenstall Town Centre and a the A56/M66 corridor. As noted in Section 5.0, demand for office accommodation in Haslingden, Bacup and Whitworth is weaker. The greatest demand for office accommodation is for small sites under 94sq, (1,000sqft). Just seven existing sites are categorised as office sites./business park in Table 8.2 comprising 16.8ha of land. The commercial view is that there is some pent up demand for high quality, small scale accommodation with its own front door. There may also be latent demand for small office units to be made available as start up space for new business.

8.13 Table 8.2 indicates that of the 65 existing employment sites in the Borough, 48 can be categorised as being industrial areas, with 19 comprising relatively low quality manufacturing, small scale storage and light industrial uses, often located in mill buildings and old industrial sites.

Table 8.2 Type of Employment Space in Rossendale Borough

	Office site/ business park	General industrial area	Lower value industrial area	Warehouse and distribution area	Single occupier site	Vacant Building
Number of Sites	7	29	19	1	4	5
Total Area (ha)	16.8	75.3	51.8	3.7	11.1	5.7

Locational Distribution of Employment Space

8.14 It is clearly important to ensure the appropriate distribution of allocated sites is in the right location to meet future requirements and to accord with sustainable development principles.

8.15 A broad indication of levels of existing employment land by sub-area is presented in Table 8.3. This suggests that 75% of existing employment land is located in the A56/M66 corridor and the Bacup/Waterfoot/Stacksteads areas, with more modest amounts in Rawtenstall and Whitworth.

8.16 An analysis of the distribution of committed employment land elsewhere in the District indicates that there may be an imbalance in provision. For example, whilst the Bacup/Waterfoot/Stacksteads area has almost a third of the total existing employment sites, the area has less than 1ha of committed employment land (4% of the Borough's total).

Table 8.3 Employment Space by Sub-Area

	A56/M66 Corridor	Rawtenstall	Bacup / Waterfoot / Stacksteads	Whitworth
Existing Employment Land Area (existing employment areas including those identified by Local Plan and sites under construction)	71.8	29.7	54.7	11.9
% of Total Existing Employment Land	43%	18%	32%	7%
Committed Employment Land Area (employment allocations and sites with extant planning permission for employment)	10.4	3.9	0.7	3.7
% of Total Committed Employment Land	55%	21%	4%	20%

8.17 Although the quantitative analysis indicates that there is limited need for additional employment land under the preferred growth scenario, adequacy of provision also needs to reflect current deficiencies for certain types of uses and property and market views as well as the wider aims for each area. The quality of individual sites has also been appraised in Section 6.0 and the conclusions are brought together for each sub-area below.

A56/M66 Corridor

8.18 The A56 and M66 corridor is the most favoured and buoyant business location in Rossendale Borough, benefitting from good road links. This area contains a number of existing employment areas, many of which, in contrast to eastern parts of the Borough, are modern and generally of good quality.

8.19 Nevertheless, from the site assessment undertaken to inform Section 6.0, it is apparent that several of the existing employment sites do not meet modern needs for employment space and which scored particularly poorly in the site appraisal process as a consequence. Specifically:

- **Site E30,** Musbury Fabrics, Helmshore (4.6ha): which includes a large vacant area to the east of Holcombe Road with limited employment potential (the former Airtours site);
- **Site E31,** Mayfield Chicks, Helmshore (3.3ha): a site featuring a number of partially derelict farm buildings with a very low quality environment and a substantial area used for open storage;
- **Site E33,** Croft End Mill, Edenfield (0.6ha): a vacant mill that does not meet modern needs.

8.20 As regards the availability of new employment sites, this sub-area contains four allocations, Site E1, Land adjacent to Baxenden Chemicals/Hollands Pies, Haslingden; Site E2, Newlock, Haslingden; Site E3, units on Commerce Street, Haslingden (Carrs Industrial Estate) and Site E4, Land at Kings Way, Holcombe Road. All four sites, comprising 9.5ha in total, benefit from close proximity to the strategic road network and scored reasonably well in the site appraisal.

8.21 The corridor also contains 3 other committed sites considered to form part of the overall employment land portfolio, totalling 0.9ha. With the exception of the small site at Croft End Mill (E33, with extant planning permission for a printing facility), the sites scored relatively highly in the qualitative appraisal.

8.22 In summary, whilst the A56/M56 corridor is (alongside accessible locations around Rawtenstall and Haslingden) generally regarded as the area of the Borough where demand for employment space is greatest, there is a good match between the quality, size and location of committed employment land and likely demand in the area.

Rawtenstall

8.23 After the A56 and M66 corridor, Rawtenstall is considered the most favoured business location in the Borough. The town has fourteen existing employment sites totalling 29.7ha, with the vast majority rated as being average to good in the site appraisal. A number of the existing employment sites in the town benefit from good access to local services, public transport links and proximity to the A56. However, there may be a requirement for several of the sites (specifically sites E43, Lamberts Fallbarn, Cloughfold and E44, Jacobson Footwear, Cloughfold) to obtain further public investment to improve the local road network in order for them to appeal to a wider range of occupiers.

8.24 As regards committed employment sites, there are three sites currently available for employment use in the town, of which E7 Rossendale Business Park (New Hall Hey) is a particularly high profile well performing site. However, site E11, the Paddock at Cloughfold (0.3ha), suffers from poor visibility from the main road, would require investment in the current road access and remains a low profile site.

8.25 At present Rawtenstall appears to have a slight under supply of employment space available relative to demand, and consequently there is a case for a new allocation in this sub-area. Furthermore, it is understood that some doubt surrounds the certainty of New Hall Hey (E7) coming forward for employment use, as part of the site is currently under construction for alternative uses (although the planning permission does include a condition requiring that within 18 months of occupation of Unit A1, not less than 1,651 sq.m of B1 floorspace shall be constructed and made available for occupation – LPA Ref: 2007/030).

8.26 However, it is emphasised that New Hall Hey (E7) scored very well in the site assessment, is located within the designated Rawtenstall Town Centre boundary and is in a high profile location which is part of the wider Rossendale Business Park (New Hall Hey). The site also has good access to local services and public transport.

8.27 Rawtenstall town remains the predominant focus of the Borough's limited office market, which is focused on meeting local needs and public sector administrative functions. The implications of this slight under supply are considered in further detail in Chapter 9.

Bacup/Waterfoot/Stacksteads

8.28 There is a perception that the eastern part of the Borough is less accessible and attractive to the market than elsewhere. Demand in these areas is generally more limited and localised, and the area has a high proportion of mill buildings and older industrial estates which are unable to meet modern requirements and remain vacant or under-utilised.

8.29 This area has a high number of existing employment sites, many of which are small in scale and comprise older stock catering for more traditional manufacturing businesses. The office market in Bacup/Waterfoot/Stacksteads is limited, with the exception of the ongoing developments at Futures Park (site E69) in Bacup.

8.30 Of the 20 existing employment sites, the site appraisal in Section 6.0 noted that 1 was of good quality, 10 were of average quality and the remaining nine were rated as being poor, several of which could be suitable for release from the employment land portfolio should they become available for alternative uses over the plan period. The implications for these sites are considered in further detail in Chapter 9.

8.31 There is one small allocation in the sub-area with remaining land, Park Road Business Centre, which has 0.3ha available. This site was rated as being of 'good' quality in the site appraisal. The sub-area also has one employment land site with extant planning permission for a B1/B2 business general industrial unit, of 0.4ha on Plot 3 at Futures Park. The site is available but is known to have constraints on development, including contamination.

8.32 It is recognised that this area has relatively low demand and already benefits from a considerable stock of existing employment space, some of which could be refurbished or sub-divided to provide new industrial uses should demand arise. Nevertheless, whilst the focus should be on improving older industrial sites and reducing vacancy levels, there is a need to overcome negative perceptions of the area and to avoid a general stagnation in supply through the provision of new employment land to provide choice.

Whitworth

8.33 Whitworth, whilst remaining relatively accessible, is often seen by developers as standing remote from the rest of Rossendale and is more closely linked to economic activity in Rochdale. Demand for industrial and business space is more limited in Whitworth than in Rawtenstall and the A56/M66 corridor, and is generally limited to serving local requirements. This area of the Borough contains relatively few existing employment sites, all of which are along (or in close proximity to) the A671 corridor.

8.34 Of the ten existing employment sites in this area, the site appraisal in Section 6.0 noted that one is of good quality, four of average quality and a further five rated as being poor for a combination of reasons including inadequate service linkages and poor quality buildings. It is considered that several of these may possibly be suitable for release from the employment land portfolio should they become available for alternative uses over the plan period. The implications for these sites are considered in further detail in Chapter 9.

8.35 This area of the Borough also has two allocated sites, both at Barlow Bottoms, Whitworth, for 3.5ha, and a committed site with planning permission for six units at Spodden Mill (Kennedy Transmission). Both sites scored poorly in the appraisal process.

Type of land available

Industrial / Warehousing uses

8.36 Whilst one of Rossendale's main attractors is its relatively low cost land and rents compared with other parts of Pennine Lancashire and Greater Manchester, this reflects the fact that much of the Borough's stock is reasonably old (particularly in the east of the Borough) and caters for a very localised market. The commercial viewpoint is that Rossendale has little potential to attract footloose industrial and distribution occupiers, partly due to a lack of sites, but also due to a fundamental issue regarding the inability to assemble large level sites. Competition from existing and emerging industrial parks in close proximity to the M65 corridor is meeting demand for large scale distribution uses.

8.37 In summary, it is suggested that any new industrial and warehousing sites should be used to provide small industrial units, suitable for B1c, B2 or B8 uses, serving the local market, with minimal need anticipated for large distribution units. There may be an opportunity to refurbish or sub-divide some older industrial estates for new industrial/alternative uses, subject to viability given the relatively low rents. Ideally, there would be a 'ladder' of premises of different sizes including start up space to medium-sized units. This should have a good quality environment, with clear road layouts, good signage, well defined plot boundaries, site management and good external road access.

Office uses

8.38 Within any new office provision, ideally there should be a choice of town centre, edge for centre and out of centre locations. However, it is recognised that the demand is primarily for local users and for administrative public sector work, with the relatively limited demand concentrated in the Rawtenstall and (for the private sector) M66/A56 areas.

8.39 In these locations, there may be some demand for accessible, high quality small scale business accommodation with its own 'front door'. Although the demand will primarily constitute smaller units under 94sqm (1,000 sqft), there should be a ladder of accommodation to help develop the embryonic local office market and retain expanding businesses. This could involve an office site containing small, individual 2-3 storey units as well as a larger unit on a new allocation.

Summary

8.40 The above analysis suggests that in quantitative terms, there is potentially an adequate supply of employment land to meet future needs to 2026 if the more conservative scenarios relating to future employment growth potential are realised.

8.41 Nevertheless, qualitative factors and the need to make adequate provision with sufficient developer choice in different parts of the Borough suggest a need for the de-allocation of certain sites and a need for new replacement sites in some areas. In summary, the recommendations are:

1) The preferred growth forecast, Scenario 1 Severe Recession, suggests a need for -5.7ha (net), equating to 20.8ha (gross) once potential losses of employment land have been incorporated. The current employment land supply equates to 18.7ha. Consequently, there is a modest shortfall of employment land in quantitative terms at least, in the Borough.

2) Consequently, there may be further scope for new allocations to provide modern, good quality industrial space under 464sqm (5,000 sqft). These should be focused upon serving the local market. There is minimal need for large distribution units in the Borough. At the same time it would be beneficial to complement any new provision by seeking to upgrade the stock of employment space generally. There is scope to upgrade older industrial areas through re-cladding, gradual redevelopment of individual sites and sub-division of larger units to provide more modern space suited to market needs.

3) There may be potential for new small scale high quality office allocations. It is recommended that these allocations would promote high quality small scale business accommodation featuring a ladder of accommodation to help develop the embryonic local office market and retain expanding businesses.

4) Much of the B1c/ B2 development over the next 10 years in the Bacup / Waterfoot / Stacksteads and Whitworth sub-areas is likely to comprise recycling or replacement of existing stock, therefore the net gain of stock may not be significant. It is suggested that the priority should be on improving the quality of the existing stock and reducing vacancy levels through refurbishing or sub-divided existing units in the short term at least.

5) Given the judgements involved in producing these estimates of future of employment space needs against a background of limited data availability and severe economic recession, it will be important to monitor any estimates against future development levels and demand to identify whether further review is necessary. This will require monitoring of take-up of employment land for the different sub-areas involved.

6) Sites recommended for de-allocation or for release from existing employment use, along with the identification and appraisal of potential new employment sites (option sites), are discussed in Section 9.0 of this Employment Land Study.

9.0 Supporting Economic Growth

9.1 Drawing on the earlier analysis, this section sets out recommendations on the suggested approach to support Rossendale's economic development objectives. Drawing together the analysis in the preceding sections, it provides recommendations on sites for potential allocation and what particular type of employment accommodation they should provide. This section also considers other measures which may be required to support the Borough's employment land strategy.

Future Employment Land Requirements

9.2 This Employment Land Study recommends that future employment land requirements for Rossendale should be based upon the assumption that the Borough will achieve the level of growth set out under Scenario 1 – Severe Recession (in the short to medium term). As a consequence, it is recommended that Rossendale needs **20.8ha** (gross) of employment land over the 18 year period 2008-26.

9.3 Consultation and desk-based research have indicated that this is a realistic and attainable level of growth that seeks to temper the prospects for expansion offered by the Borough's recent growth in financial and other service sector activities and excellent quality of life indicators (which are likely to encourage more footloose enterprises to locate in the Borough), set against the uncertainties of the ongoing recession and the proximity of Greater Manchester.

9.4 An analysis of ABI data indicates that Rossendale has achieved solid levels of employment growth prior to the onset of the recession and the level of employment land required under this scenario is not significantly higher than historic levels of past take up. In addition, whilst the recession is clearly having a substantial impact on the local economy in the short to medium term, it is hoped that in the long term economic growth will be cyclical. These factors provide confidence that the level of growth being planned for can be achieved.

Existing and Allocated Employment Site Appraisals

9.5 NLP undertook site visits of 94 existing, allocated and option employment sites totalling almost 300ha in size. The process reveals that overall, the Borough contains a range of industrial sites of differing quality and type. Rossendale Borough contains relatively few office developments and these tend to be clustered in and around the service centre of Rawtenstall together with office accommodation at Futures Park, Bacup.

9.6 The Borough's historic heritage is reflected in the high proportion of mill buildings found across the Borough, many of which are unable to meet modern employment requirements and therefore remain vacant or under-utilised.

9.7 Areas in the east and north of the Borough generally serve a more localised demand and these areas have a high proportion of older industrial estates.

9.8 The better scoring sites are generally located along the A55/M66 corridor or in Rawtenstall. There is the potential to further capitalise on the accessibility of these areas through the upgrading of existing employment sites and by new employment development.

9.9 Whilst almost 300ha of employment land was appraised, the amount of actual developable land with an employment 'commitment' is considerably less; **18.7ha** across 14 sites. These 14 sites comprise 8 employment allocations which have not been built out; 2 sites which are not allocated but which have extant planning permissions for employment development; 1 existing, long term vacant employment building with planning permission for employment use; and 3 sites with development potential within wider existing designated J3 employment sites.

9.10 Of this 18.7ha, 11.3ha is assessed to be of good quality; 3.6ha is rated as being of average quality; whilst the remaining 3.8ha is rated as being of poor quality.

Need for Additional Allocations

9.11 In summary, it appears sensible to plan for a net requirement of -5.7ha of employment land, and a gross requirement of 20.8ha, factoring in the 20% margin of choice. When compared against the existing supply of committed employment land, which currently stands at 18.7ha, **this would indicate a modest shortfall of some 2.1ha of employment land, in quantitative terms**.

9.12 In qualitative terms, the assessment has identified an imbalance in the distribution of provision across the Borough; for example, the Bacup / Waterfoot / Stacksteads area has almost a third of the total existing employment sites, but less than 4% of Rossendale's committed employment land. Whilst a modest quantitative shortfall has been identified, adequacy of provision also needs to reflect current deficiencies for certain types of uses, the views of the property market and wider aims for each area.

9.13 Table 9.1 presents a broad summary of the demand/supply balance by location to 2026. It indicates that:

- Despite being the most favoured and buoyant business location, the **A56/M66 corridor** has a good match between the quality, size and location of committed land and likely demand;
- Relatively high demand (in the Rossendale context) is also apparent in **Rawtenstall**, and the town appears to have a slight under supply of employment space available to meet this demand. Furthermore, there is no certainty of New Hall Hey coming forward for employment use.

- Demand in the **Bacup/Waterfoot/Stacksteads** area is more limited and localised with a high proportion of older stock catering for more traditional manufacturing businesses. However, there is very little committed employment space available in this area, and there is a need to avoid a general stagnation in supply.
- **Whitworth** also has relatively weak levels of demand, and the presence of three committed sites suggests that there is an oversupply of employment space in this part of the Borough.

Table 9.1 Comparison of Supply and Demand for Employment Land in Rossendale

Location	Existing Employment Land Supply (ha)	Market Demand (Rossendale Context)	Demand / supply balance to 2026
A56/M66 Corridor	10.4	High	↔
Rawtenstall	3.9	High	↓
Bacup/Waterfoot/ Stacksteads	0.7	Low	↓
Whitworth	3.7	Low	↑
ROSSENDALE TOTAL	**18.7**	**Moderate**	↔

Key: ↓ = under-supply ↑ = over-supply ↔ = adequate supply

9.14 With these points in mind, the remainder of this section of the Employment Land Study will seek to address the following issues:

- Assess which employment sites are important to retain and protect and which could potentially be released for other uses or mixed use development;
- Assess potential new employment sites to meet the quantitative and qualitative shortfall in supply;
- Provide recommendations on the scope for new allocations to provide modern, good quality industrial space under 464sqm (5,000 sqft), focused upon serving the local market;

- Explore the potential for new, high quality, office allocations comprising small scale business accommodation;
- Provide recommendations on the extent to which any new provision can be complemented by a general upgrade in the stock of existing employment space. The discussion will explore the possibility of improving the quality of the existing stock and reducing vacancy levels through refurbishing or sub-divided existing units;
- Review the opportunities and potential policy approaches to employment land in the rural parts of the Borough.

Recommended Site Portfolio

9.15 Maps at Appendix 5 summarise our recommendations for the future site portfolio.

A56/M66 Corridor

9.16 As noted in Section 8.0, although the A56/M66 corridor is generally regarded as the area of the Borough where demand for employment space is greatest, there is a good match between the quality, size and location of committed employment land and likely demand in the area, with around 10.4ha committed employment land available. The remainder of this section discusses the extent to which the existing land portfolio in the A56/M66 Corridor is fit for purpose, and whether, in the light of recommendations concerning site de-allocations and the current supply of land, there is a need for any new allocations.

Recommended De-allocations of 'Committed' Employment Sites

9.17 On the basis of the site appraisals, one site in the A56/M56 corridor, E33 (Croft End Mill, 0.59ha), is recommended for removal from the portfolio of employment land. It is considered that this vacant former mill site does not meet some modern needs for employment space. The site is small, constrained, and is close to a number of dwellings. Whilst the site is not allocated in the Local Plan for employment, it is marketed for employment use and has an extant planning permission for a printing facility. Croft End Mill is allocated (saved policy) for housing use in the Rossendale Local Plan and housing is considered to be a more appropriate use for the site. It is therefore considered that if the planning permission for a printing facility on the site is not implemented, the site should not be taken forward for employment use in Rossendale's LDF.

9.18 NLP was also specifically requested to consider whether or not land adjacent to Baxenden Chemicals (E1) should be retained as an allocation. It is understood that this site was allocated specifically to allow for the expansion of Baxenden Chemicals, which has not occurred (the site has been allocated since 1995) and NLP is not aware of a requirement by Baxenden Chemicals to expand in the foreseeable future. However, whilst the site has not yet come forward, subject to satisfactory access to the site being obtained, it is considered to be suitable for employment use and scored well in the site assessment accordingly: it is therefore recommended that the allocation is retained.

Monitor

9.19 It is suggested that Site E30 (Musbury Fabrics & Air Tours) is monitored. The site is fairly remote from services and regular public transport services and performed poorly in the site assessment. The site has two sections: -

1. The area to the west of Holcombe Road comprises a jumbled mix of varying quality employment areas (including Musbury Fabrics) mixed in with housing and other uses. Part of this area (the south western part) is therefore currently fulfilling an employment role.
2. The area to the east of Holcombe Road comprises a large, cleared site (the site of the former Airtours head quarters). This land has limited market attractiveness to be developed for employment uses and has resolution to grant planning permission for a mixed use development incorporating employment and residential uses, subject to a Section 106 Agreement.

9.20 In respect of the area to the west of Holcombe Road (including Musbury Fabrics), it is recommended that although existing employment uses on this site may continue as required, the site is no longer 'protected' against release for non-employment use and that development proposals for non-employment development are considered on a case-by-case basis.

9.21 In respect of the area to the east of Holcombe Road (the site of the former Airtours head quarters), it is recommended that the Council consider a flexible approach to the redevelopment of this part of the site. If the resolution to grant planning permission does not come forward, it is recommended that the Council consider releasing this part of the site (which is approximately 2.19ha) for employment, residential or mixed use development, depending on market demand.

Potential for New Allocations

9.22 Clearly, the current employment land portfolio in the Corridor is relatively well stocked, with well over half of the total Borough's committed employment land. The allocated sites scored relatively highly in the site appraisal, with only a small site, E33 (Croft End Mill), comprising 0.59ha, recommended for removal. However, there are a significant number of existing sites in the sub-area which would benefit from upgrading and/or intensification (see below).

9.23 To facilitate existing older employment sites being upgraded or redeveloped without forcing businesses out of the Borough, it could be argued that some new sites or premises may need to be provided to accommodate the relocation of firms and hence there may be justification for an additional small general B1/B2/B8 allocation. Consequently, to ensure that no option sites exist in the area that would represent more suitable alternatives to existing allocations, six option employment sites were identified for appraisal in consultation with Rossendale Borough Council:

- **CFS88, Touch and Take Farm, Haslingden (0.94ha)**, is visible from the A56, A680 and A681 and is near to a Tesco's superstore and the Knowsley Road Industrial Estate. Due to the site's high profile location and excellent links to the strategic road network, market perceptions of the site's suitability for employment use are positive. However, the site's location within the Green Belt, beyond the urban boundary, represents a major planning policy constraint. Furthermore, the site contains an electricity sub-station together with pylons, and these site-specific constraints would need to be addressed as part of any development of the site. Overall, the site has reasonable development potential but scored within the 'average' category of sites.

- **Site E83, land rear of Manchester Road Service Station, Haslingden (0.26ha),** benefits from excellent access to the road network and lack of identified planning constraints. It is, however, situated in a predominantly residential area adjacent to a petrol station (which is in use). The site has potential to be developed for small scale employment uses, but this would have to be strictly controlled to prevent conflicts with neighbouring residential uses. Overall, the site scored within the 'average' category of option sites assessed.

- **CFS122, Hutch Bank Quarry (39.34ha),** is a disused quarry; the steep hillside topography and poor quality road access represents a major constraint to any significant development. As a result, the site scores within the 'poor' category in the site assessment. However, the area of the site formerly used to access the quarry could potentially be developed as an extension to E25 (St Crispin Way Industrial Estate), which is one of the best performing existing employment areas in Rossendale.

- Sites **CFS12, land at Grane Road/Holcombe Road (6.52ha) and CFS52, Gas Street, Helmshore (1.61ha)** are both identified as having some development potential. No significant development constraints have been identified on either of these sites; they are well located to the strategic road network and are close to existing, well performing, employment areas (The Courtyard and St Crispin Way Industrial Estates). However, both of these sites are located beyond the urban boundary, representing a constraint in planning policy terms, and they are further constrained by landscape/conservation considerations. Furthermore, local road access to site CFS52 would need to be upgraded for the site to be brought forward for development. The site is also set back from the main road in a low profile location, concealed from the main road by neighbouring residential properties. Site CFS52 may therefore need to be developed in conjunction with all or part of the neighbouring site CFS12 for it to be attractive to the market. Overall, site CFS12 has been identified as an 'average' quality site due to its combination of a reasonable location and identified planning constraints. Site CFS52 has been assessed as a 'poor' quality site in reflection of its lower profile and poorer access.

- Site **E82, Edward Street, Haslingden (0.28ha),** is a small, relatively low profile, site predominantly surrounded by residential development with a retail unit to its northern boundary. This site holds limited potential for employment development and may be better suited to residential development. The site was the weakest scoring of all the development sites assessed in the A56/M66 corridor sub-area.

9.24 In summary, the option employment sites appraised were generally of a relatively poor quality in the Rossendale context; even the higher scoring sites (CFS12, E83 or CFS88) are likely to have a limited future role due to either their small size (E83) or specific planning policy constraints, particularly Green Belt (i.e. CFS12 and CFS88). Given the current size and quality of the land portfolio, relative to demand, it is not recommended that any new site allocations be provided in this sub-area.

Table 9.2 A56/M66 Corridor - Option new sites

Ref.	Site	Area	Score	Overall Rank
CFS12	Land at Grane Road/Holcombe Road	6.52	34	Average
E83	Land rear of Manchester Road Service Station, Haslingden	0.26	32	
CFS88	Touch and Take Farm, Haslingden	0.94	31	
CFS122	Hutch Bank Quarry	39.34	27	Poor
CFS52	Gas Street, Helmshore	1.61	27	
E82	Edward Street, Haslingden	0.28	25	

Rawtenstall

9.25 As noted in Section 8.0, Rawtenstall is an area of the Borough where market demand is relatively strong, albeit indigenous in its scale and outlook. The commercial property market in Rossendale is relatively small scale and, with some notable exceptions, industrial in nature, predominantly comprising a number of smaller industrial estates. There remains around 3.9ha of available employment land, although this is on the assumption that the New Hall Hey site comes forward for employment use, which is uncertain at this time. The remainder of this sub-section discusses the extent to which the existing land portfolio in Rawtenstall is fit for purpose, and whether, in the light of any recommendations concerning site de-allocations and the current supply of land, there is a need for any new allocations.

De-allocations – Commitments

9.26 As regards Rawtenstall's current employment site portfolio, the appraisal process concluded that the majority of sites were of a reasonable quality and should be retained as employment commitments. A concern was raised regarding the market attractiveness of 'The Paddock' at Cloughfold (E11, 0.32ha), which offers potential for the expansion of the adjacent general employment area (Site E43). Site E11 is located to the rear of E43 and would probably need to be accessed via the current estate road through E43. The site is not visible from the main road and is therefore in a fairly low profile location. The site will therefore only come forward if site E43 is expanded which has not occurred over the Local Plan period. However, given the development constraints of alternative sites in the area, it is not recommended that it is de-allocated at this time, although RBC should continue to monitor progress at site E43 and the need for this expansion land.

New Allocations

9.27 As noted in Section 8.0, Rawtenstall currently has an under-supply of committed employment sites, particularly if part of the New Hall Hey land commitment is lost to alternative uses. Rawtenstall town remains the predominant focus of the Borough's limited office market, which is focused on meeting local needs and public sector administrative functions. Consequently, it is considered that the development of relatively small scale office units could be encouraged, with perhaps an additional 3-4ha of accessible, high quality small scale business units in the town, based on past take up relative to supply and the uncertainty surrounding the delivery of employment land at New Hall Hey.

9.28 Seven option new employment sites were therefore identified for appraisal in consultation with RBC:

New Hall Hey Area

- **E90, former Accrington and Rossendale college (0.68ha)** is the highest performing option development site assessed by this study and therefore falls within the 'good' category of sites assessed. This cleared site is within Rawtenstall Town Centre and has excellent road links, being located adjacent to the A681/A682 junction. No major development constraints were identified; however the site may not be available for employment development as it has planning permission for a hotel.

- **CFS86, Site 7a Former Groundwork, New Hall Hey (1.00ha)** is immediately adjacent to the New Hall Hey Business Village and is therefore well located for Rawtenstall Town Centre. Development of the site would provide a natural extension to the adjacent employment area. However, it is also an attractive area of managed open space adjacent to the River Irwell which is designated as 'greenland' by the Local Plan and partly falls within a flood risk area. The site's development would therefore mean the loss of a valuable recreational open space adjacent to Rawtenstall Town Centre. Despite the site's prominent location and development potential it therefore scored within the 'average' category of sites assessed. Considering the function of this site as open space, RBC may consider it preferable to develop alternative sites in this area.

- **Sites CFS82, Site 1B, Former Groundwork, New Hall Hey (1.04ha) and E89, Land between East Lancs Railway and River Irwell, Rawtenstall (2.14ha)** are both located near to the New Hall Hey Business Centre and close to Rawtenstall Town Centre. However, both sites are constrained by their location between the River Irwell and East Lancashire Rail Line which means that there is no road access to either site. Both sites are also in an area of flood risk. Site E89 contains a significant slope which would be difficult to develop. These sites are inappropriate for employment development with their existing access arrangements and have limited market attractiveness due to their hidden location. Site CFS82 is also designated as 'greenland' by the Local Plan and is currently in use as an informal recreation area. Due to these significant development constraints, both sites have scored within the 'poor' category of assessed sites.

Central and Eastern Rawtenstall Area

- Sites **CFS51, land off Bocholt Way, Rawtenstall (1.63ha) and CFS26, Land at Fallbarn Crescent, Rawtenstall (3.45ha)** are both located near to the centre of Rawtenstall and benefit from good connections to the strategic road network. The sites have limited development potential: the numerous trees present on both sites are a significant constraint and local road access is somewhat constrained.

- The potential for CFS26 to be developed for employment use is further limited by its location close to residential dwellings, the current use of part of the site as a children's play area and the site's designation in the Local Plan as 'greenland'. Any employment development would therefore have to form part of a sensitively designed mixed-use development. Site CFS26 has therefore been identified as an 'average' quality site.

- Site CFS51 is a vacant site close to an existing employment area. The site presents an opportunity for employment development, although part of the site is close to residential dwellings and so any development would need to be planned to ensure that use conflicts did not arise. However, the site is outside the urban boundary defined by the Local Plan; is designated by the Local Plan as 'greenland'; has significant tree cover and was a designated Countryside Area (policy not saved). Due to these planning constraints, CFS51 is identified as an 'average' quality option development site.

Haslingden Road

- Whilst **E75 (10.34ha)** is currently occupied by **Rossendale General Hospital**, it is understood that the site is likely to become available for development. The site is located at the edge of Rawtenstall and has a functional relationship with both Rawtenstall town centre and the M66/M56 Corridor. Some of the existing buildings on the site could be converted for employment use, subject to detailed investigation. Alternatively, as none of the buildings are protected, the site could possibly be redeveloped for employment (office) uses as part of a mixed-use redevelopment. Any redevelopment on the site would need to be sensitively designed to take into account site specific constraints: parts of the site are steeply sloping, the site is partially wooded and existing access arrangements may need upgrading. There are also major planning constraints on the redevelopment of this site, due to its location within the Green Belt. However, the site is substantially developed and meets the requirements for a Major Development Site, as outlined in PPG2 (Annex C). The redevelopment of the site in accordance with the guidance in PPG2 could maintain the openness of the gap between Rawtenstall and Haslingden. It is therefore recommended that consideration should be given to allocating the site as a major developed site. Overall, the site has scored within the 'average' category of option sites assessed.

9.29 Overall, the option employment sites appraised are all problematic to a greater or lesser extent, with a variety of planning policy issues.

9.30 Whilst E90, the former Accrington and Rossendale College site, rates very highly and would be our first choice when considering new B1a office allocations in the sub-area, the site may be considered unavailable at present as there is an extant planning permission for a hotel at the site.

9.31 The Rossendale General Hospital site (E75) scores reasonably well. Although the site is well–located, it is constrained by its location within the Green Belt and by site specific constraints. However, the site is substantially developed and meets the requirements for a Major Development Site, as outlined in PPG2 (Annex C). The redevelopment of the site in accordance with the guidance in PPG2 could maintain the openness of the gap between Rawtenstall and Haslingden. It is therefore recommended that consideration should be given to allocating the site as a major developed site. The site is considered to have good development potential for employment uses as part of a mixed-use development and should therefore be considered as a new allocation for the area. However, the issues identified above would require careful exploration ahead of any formal allocation in the Council's emerging LDF.

9.32 The Accrington and Rossendale College site (E90) would be the preferred additional allocation site in Rawtenstall, however this site will not be available for employment if the extant planning permission for a hotel is implemented. Rossendale General Hospital (E75) also performed well in the assessment, but is constrained by site specific constraints and by its location within the Green Belt which would require the site to be allocated as a major developed site in the Green Belt. Should either the Accrington and Rossendale College or Rossendale General Hospital site not come forward, then alternatives are limited - both CFS86 and CFS51 comprise greenfield land with important recreational functions, whilst CFS26 (Land at Fallbarn Crescent), is itself designated 'greenland', although located close to an existing employment area.

9.33 It is therefore considered that whilst E90 and E75 should be the first choices when identifying any new allocation in the area, if either of these sites do not come forward, then RBC should seek an alternative 1-2ha B1a office allocation in the vicinity of Rawtenstall Town Centre as part of the LDF site allocation process.

Table 9.3 Rawtenstall –Option new sites

Ref.	Site	Area	Score	Overall Rank
E90	Former Accrington and Rossendale College	0.68	41	Good
CFS86	Site 7a Former Groundwork, New Hall Hey	1.00	33	Average
CFS51	Land off Bocholt Way, Rawtenstall	1.63	31	
E75	Rossendale General Hospital	10.34	30	
CFS26	Land at Fallbarn Crescent, Rawtenstall	3.45	30	
E89	Land between East Lancs Railway and River Irwell, Rawtenstall	2.14	25	
CFS82	Site 1B, Former Groundwork, New Hall Hey	1.04	22	

Bacup/Waterfoot/Stacksteads

9.34 Bacup/Waterfoot/Stacksteads is an area that has relatively low demand and already benefits from a considerable stock of existing employment space, some of which could be refurbished or sub-divided to provide new industrial/alternative uses should demand arise (see below). However, the current stock of available land is very low at just 0.7ha, hence the remainder of this section will discuss the extent to which the current stock in this area requires enhancement.

Release for alternative use - Existing Employment Areas

9.35 The study appraised a number of existing employment sites in the sub-area to ascertain the extent to which they contribute positively to economic growth in the Borough. Whilst a number are recommended for enhancement and investment (see section below), it is considered that **Kearns Mill, E54 (1.02ha)**, a derelict former employment building which is currently under demolition, is unsuitable for future employment uses. The plot is marketed for residential use and also has extant planning permission for residential development. The site is also relatively isolated and is in close proximity to residential uses. E54 was not allocated for employment use in the Local Plan and due to its location and surroundings it is considered that it does not meet modern occupier requirements. Overall, it is considered that employment is no longer an appropriate use to be promoted on this site.

De-allocations - Commitments

9.36 The only employment land commitments in this sub-area comprise small sites at Park Road Business Centre and Futures Park. The site at Park Road Business Centre was rated as being of 'good' quality during the appraisal process. One of the undeveloped plots at Futures Park (plot 3) has planning permission for a B1/B2 business general industrial unit and was also rated as 'good' quality.

9.37 It is recommended that these sites be retained for employment use, hence no de-allocations are suggested for the Bacup / Waterfoot / Stacksteads area.

New Allocations

9.38 It is generally recognised that the demand for new industrial premises in the sub-area is relatively low, and that the focus should be on improving older industrial sites and reducing vacancy levels (see below for specific site recommendations). Nevertheless, given the very limited amount of employment land in the pipeline in the wider Bacup/Waterfoot/Stacksteads sub-area, and to overcome negative perceptions and avoid a general stagnation in supply, it is recommended that in the medium to long term there is still a need for a limited allocation of small general industrial space of around 1-2ha in size.

9.39 With this in mind, five option employment sites were appraised:

- **E69, Futures Park (2.63ha)** is a partially developed business park with good access to local services and the labour market. Approximately 2.63ha remains undeveloped at the site of which 0.38ha already has planning permission for a B1/B2 business general industrial unit. The existing units on the site are of a reasonable standard and contain high quality occupiers. The development (which is partially funded by the public sector) is heavily marketed and internal estate roads to some of the undeveloped plots are already constructed. Feedback from agents suggests that there is market demand for general industrial development on the site, but that demand for high-tech industry/office development is more limited due to the site's Bacup location. The site scores fairly highly in the appraisal and, with a fair proportion of the site remaining vacant, it provides a good opportunity for further employment development in the Borough. However, it is understood that part of the site is affected by contamination and other site constraints. The site therefore falls within the 'good' quality category but at the lower end of the scale.

- **Sites E78, former Norweb power station, Stacksteads (0.35ha) and E74, land adjacent to Bacup Leisure Hall, Bacup (0.56ha)** are both small sites surrounded predominantly by residential development and a leisure hall adjacent to E74. These sites could be suitable for small-scale employment uses, but any development would need to be compatible with adjoining residential uses. Overall, both these sites are assessed as being at the lower end of the 'average' category of sites assessed.

- **Sites CFS77, sports pitches (1.1ha) and CFS35, recreation ground in Stacksteads (2.36ha)** currently fulfil functions as recreational grounds and are designated as such in the Local Plan. CFS77 contains two football pitches and CFS35 contains a basket ball court. CFS35 is further constrained by its location outside the designated urban boundary, by the river which runs through the site (with associated floodrisk and development constraints) and by numerous trees. Both sites suffer from poor local road access and are close to residential development. Overall, both sites have limited potential as locations for employment development due to the constraints identified above and because their development would cause the loss of a valuable local recreational amenity.

9.40 Overall, Futures Park, Bacup, was rated the best option employment site in the sub-area, ahead of the two small sites (suitable for B1-type uses due to sensitive adjoining uses) and the two recreational sites in Stacksteads. It is recommended that expansion land to this relatively successful estate should be supported, although it is noted that there are issues over potential contaminated land on part of the remaining site area which may reduce the size and/or the viability of development.

Table 9.4 Bacup/Waterfoot/Stacksteads – Option new sites

Ref.	Site	Area	Score	Overall Rank
E69	Futures Park, Bacup	2.63	35	Good
E78	Former Norweb Power Station, Stacksteads	0.35	30	Average
E74	Land Adjacent to Bacup Leisure Hall, Bacup	0.56	30	
CFS77	Sports pitches, Stacksteads	1.1	21	Poor
CFS35	Recreation Ground, Stacksteads	2.36	18	

Facit and Whitworth

9.41 Facit and Whitworth are often seen by developers as being part of a separate commercial market to the rest of Rossendale, with stronger linkages to Rochdale further south. Demand for industrial and business space is more limited here than in other locations in the Borough and predominantly serves local requirements. This sub-area currently has two (adjacent) allocated sites, comprising 3.54ha, and a committed site with planning permission for six units at Spodden Mill. The remainder of this section discusses the extent to which the existing land portfolio in Facit and Whitworth is fit for purpose, and whether, in the light of recommendations concerning site de-allocations and the current supply of land, there is a need for any new allocations or de-allocations.

Release for alternative use - Existing Employment Areas

9.42 There are a number of existing employment buildings in Facit and Whitworth which no longer perform an employment function. For three existing employment sites in this area, it is suggested that it would be appropriate to pursue an alternative use or to pursue employment as part of a wider mixed-use development:

- **Orama Mill, E56 (2.34ha)** lacks frontage onto a main road and it is not considered to be in a visible or high profile location. The building on the site has largely been demolished; its potential for new employment development is limited by its close proximity to sensitive uses, including the adjacent school. It may be appropriate to release this site for alternative, or mixed-use development.

- **Facit Mill, E59 (0.69ha)** is semi-derelict and does not appear to meet modern employment space requirements. The building does have redevelopment potential, but its market attractiveness is likely to be restricted due to the distance from the strategic road network and its relatively remote location. The site is adjacent to residential uses and it may be appropriate to release this site for alternative development.

- The derelict **Albert Mill/Sunnyside Works on Market Street, E55 (1.07ha)** does not meet modern requirements for employment space. Although the building directly fronts Market Street, access into the site is constrained by a steep level change, whilst the site is surrounded by residential development. It may be appropriate to release this site for an alternative type of development/mixed use development.

De-allocations – Commitments

9.43 This sub-area currently has two allocated sites, comprising 3.54ha, and a committed site with planning permission for six units at Spodden Mill.

9.44 The site at Spodden Mill (E60) scored within the 'poor' category of sites and currently the area has a low grade of occupiers and quality of buildings. However, the site does have extant permission to be developed for new industrial units.

9.45 Site E14 (Barlow Bottoms) comprises two adjacent allocated sites totalling 3.54ha. It has poor connections to the strategic road network and is remote. There may be contamination issues to resolve and the development of the site is constrained by the river through the site. The site would also be a fairly large employment development in relation to its location within the Borough and we consider that demand does not exist for an allocation of this size in this location. Carrying this allocation forward would therefore lead to the over-supply of employment land in this sub-area. We therefore recommend that the deallocation of the site is considered and the potential to develop it for alternative uses is examined, subject to development requirements.

New Allocations

9.46 Generally, given the size of the current employment land portfolio in Facit and Whitworth relative to likely (limited) demand, it is considered that there is an over-supply of committed employment land (hence our recommendation to consider the de-allocation of site E14). However, two option new employment sites in this area were identified for appraisal in consultation with Rossendale Borough Council:

- **Site E86 (land at Cowm Park Way South, Whitworth)** is a small site adjacent to the river which is used as an informal recreation space. The site lacks frontage onto a main road and is in a predominantly residential area. However, the site could be considered suitable for very localised employment development in conjunction with the adjacent site, E56.

- **Site E87 (disused quarry, Facit)** is a topographically constrained, disused, quarry remote from services and public transport. The site has very difficult local road access and is outside the defined urban boundary. The site has scored poorly in the appraisal.

9.47 In summary, both sites performed relatively poorly in the appraisal process. Furthermore, as no further qualitative or quantitative need is identified to allocate further land for office or industrial/warehousing development in this general area, it is considered that no further action is required.

Table 9.5 Facit/Whitworth – Option new sites

Ref.	Site	Area	Score	Overall Rank
E86	Land at Cowm Park Way South Whitworth	0.63	25	Poor
E87	Disused quarry, Facit	24.18	18	

Other Measures to Support Economic Growth

Release of Employment Land

9.48 As set out in Section 5.0, a number of existing and committed employment sites performed poorly in the site assessment. These predominantly relate to sites in the Bacup/Waterfoot/Stacksteads and Facit/Whitworth areas of more limited market attractiveness. However, most of these sites appear to be meeting local needs to a greater or lesser degree.

9.49 Any candidate sites for release should not only perform poorly against the criteria used in the site assessment forming part of this Employment Land Study, but should also be failing to perform a useful economic role; indicators include a combination of obsolete buildings, high vacancy rates and difficultly in letting units, with sites remaining undeveloped after a considerable period. Other indicators include causing adverse impacts to surrounding uses (such as residential) in terms of environmental factors or traffic.

9.50 Site E14 (Barlow Bottoms) comprises two adjacent allocated sites totalling 3.54ha. Although this fairly poorly performing site has reasonable development potential, it is located in the Facit and Whitworth sub-area which has an over-supply of committed land. We therefore recommend that the deallocation of this site is considered and that additional land is instead allocated in the Rawtenstall sub-area of greater demand.

9.51 There was one poorly performing site which was not allocated, but which has extant planning permission for employment development, E33 Croft End Mill (0.5ha). If this planning permission is not taken up, it may be appropriate for RBC to consider the appropriateness of other uses on this site.

Renewal/Intensification of Existing Sites

9.52 There are a number of sites which would benefit from being upgraded, for example through the improvement of estate roads or improvement of the quality of buildings. The sites with most potential to benefit from upgrading (and to therefore attract more occupiers or a different type of occupier) are generally located in the more accessible parts of the borough: the A56/M66 corridor and Rawtenstall.

9.53 As noted in Section 8.0, a significant proportion of Rossendale's existing employment sites, are older industrial areas with ageing premises unsuited to modern needs or in poor condition, but with potential for renewal or intensification. Some measures that might address this could include re-cladding, gradual redevelopment of individual sites, improvements to internal road access and sub-division of larger units. Current barriers to owners doing this now include low rents, the ongoing recession and sometimes multiple ownerships of sites.

9.54 Such approaches could particularly apply to a number of the established sites in Rossendale. The main areas where some upgrading of the existing stock is required are as follows:

A56/M66 Corridor

- **Sites E32 (Voith Paper Fabrics/TNT Deliveries), E34 (Georgia Pacific), E35 (Cuba Industrial Estate) and E36 (Industrial estate, Edenfield)** should be retained and possibly upgraded (including upgrading of their roads as appropriate), which would enable their role to be enhanced. Upgrading may be of particular benefit to E36 (Industrial Estate, Edenfield), which currently suffers from fairly high vacancy rates and is relatively run-down.
- A cluster of well performing sites at Knowsley Road Industrial Estate, Broadway and The Courtyard (**E29, E5, E53, E6 and E24**) benefit from excellent road links, low vacancy rates and lack of identified development constraints. The sites should be retained and there may be the potential to upgrade the environment of these areas, with the objective of attracting higher quality / higher value occupiers.
- **Hud Hey Industrial Park (E20)** suffers from a poor quality environment and high vacancy levels. It should be retained, but there is potential to upgrade its environmental quality to potentially improve its attractiveness to occupiers.
- **Reel Vision (E3) and Warton (E22)** both score relatively well due to their strategic locations, but under-perform due to the low quality estate roads linking them with the A680. There is the potential that public sector intervention could be used to upgrade environmental conditions and the quality of the estate roads at E22 and E3.

Rawtenstall

- **Site E41 (Units at New Hall Hey Road)** is in a high profile location at the gateway to the New Hall Hey Business Village. However, this area has a higher rate of vacancy and contains lower end users than adjacent sites. Given the site's excellent location, the industrial units within this site have the potential to be upgraded to potentially attract higher end users, although this may be constrained by multiple ownerships whilst consideration will need to be given to the conservation area which covers the eastern end of the site.
- **E44 (Jacobson Footwear) and E43 (Lamberts, Fallbarn)** are both successful (although visually fairly unattractive) industrial estates with low vacancy levels. They have quite good access to public transport and the strategic road network but are constrained by poor local access roads. These sites are well located but public investment to improve the local road network may be required in order for them to appeal to a wider range of occupiers. If it becomes vacant, the mill building on E43 may also require future redevelopment to accommodate other possible employment uses.
- **The Valley Centre (E94)** has significant potential for redevelopment or partial redevelopment and indeed the site does have extant planning permission for a mixed use residential and retail led redevelopment and some office accommodation. Although the shopping centre is currently vacant and the offices on the site are of below-average quality, the site has very good potential due to its Rawtenstall town centre location and redevelopment potential and would be likely to be suitable for further office development, possibly as part of a mixed-use development.

Bacup/Waterfoot/Stacksteads

9.55 No sites recommended for upgrading.

Facit and Whitworth

9.56 No sites recommended for upgrading.

Promoting the upgrading or redevelopment of existing sites

9.57 Current lower cost initiatives used elsewhere include some stripping and repainting of industrial units and making environmental improvements to existing estates. Similar processes of gradual upgrading should be encouraged to allow for these sites to make a positive contribution to meeting some of Rossendale's future industrial needs. Encouragement for owners/developers to do this may be necessary, and would be aided by:

- an LDF policy encouraging upgrading/redevelopment of existing employment areas for continued employment use;
- local initiatives to publicise to local firms case studies of improvements to business premises, including costs, local contractors involved and rental or other benefits achieved; and

- exploring potential sources of grant aid to enable small/medium firms to upgrade premises if the market does not deliver these improvements.

9.58 To facilitate existing older employment sites being upgraded or redeveloped without forcing businesses out of the Borough, some new sites or premises will need to be provided to accommodate the relocation of firms. This indicates a need for a cautious approach to redeveloping/sub-dividing existing employment sites until such time as reasonable alternative sites to accommodate relocations become available.

9.59 It will also be important to ensure some balance is achieved between renewal of Rossendale's older, more established employment areas, and new employment development elsewhere. The latter can provide more modern and potential better quality space, but at the same time, any significant decanting of firms to new sites could undermine the future employment role of existing sites.

9.60 Any proposals to intensify employment development on existing sites will also need to take account of the characteristics and constraints that apply in a particular location.

Rural Areas beyond the Main Rossendale Settlements

9.61 With the rural areas outside the main settlements, the low level of demand for both office and industrial space does not justify specific allocations, which may not be taken up. Rural requirements can probably be met instead through conversions of redundant rural buildings and other small-scale developments that should be assessed on a case-by-case basis. Accordingly, policy approaches which encourage some conversion of redundant rural buildings and other small scale development appear an appropriate response to the level of need, rather than making specific allocations that may not be taken up. Any future proposals could also be brought forward through a planning application and assessed against a general LDF policy on rural employment sites.

Monitor for future use or no longer 'protect'

9.62 There are a number of existing employment areas which were assessed and which scored poorly but which have existing occupiers, meaning that it would be inappropriate to actively plan for alternative uses on these sites currently. With the exception of E30 (Musbury Fabrics - the area to the west of Holcombe Road), all of these sites are derelict or semi-derelict mill buildings. However, it is considered appropriate that although existing employment uses on these sites may continue as required, it is recommended that these sites are no longer 'protected' against release for non-employment uses and that development proposals for non-employment development are considered on a case-by-case basis. These sites should also be monitored in case they become available for redevelopment in the future, as a result of business relocations/closures.

Mixed Use Development

9.63 A number of existing employment sites appear to have potential for higher-density and mixed-use development, particularly the Valley Centre, Rawtenstall (E94); Orama Mill (E56); Facit Mill (E59); Rossendale General Hospital (E75) and the derelict Albert Mills/Sunnyside Works on Market Street (E55). Mixed-use development may provide some way of encouraging renewal and redevelopment/upgrading of premises in these areas, but there is also a reasonable prospect that introducing a greater variety of uses could result in an overall net reduction in employment space, or provide new employment space that does not directly match the needs of existing occupiers, particularly lower-end users. Care will have to be taken that new mixed use schemes do not constrain operations of adjoining industrial firms. These issues will need to be considered in the context of the wider demand / supply balance identified in this study, and adequate provision be made available elsewhere.

Site Deliverability

9.64 The supply of employment land for development is highly dependent upon availability; private landowners simply may not wish to release land for development. This could be because their handling of the land is restricted by title issues or trusts, or because they have alternative aspirations for the site, often for higher value uses such as residential. .

9.65 Notwithstanding ownership and planning policy constraints, the financial viability of a site plays a crucial role in determining whether it comes forward for development. Re-development costs (particularly site remediation), anticipated demand and rental levels are all fundamental components of a scheme's viability and if these are considered to be unfavourable at a particular site then landowners are unlikely to put the land forward.

9.66 In such instances, public sector intervention may be required in the form of subsidy, grant or gap funding to make a site stack-up financially. Alternatively, a site could be brought forward as a mixed-use scheme to enable higher value uses to cross-subsidise the provision of new employment land / premises. Maintaining a flexible approach to requiring s.106 contributions could also reduce the overall financial burden on developers. Public sector investment should focus upon facilitating parcels of ready-made, serviced, development land.

9.67 It should also be noted that the greater the policy specificity and certainty, the easier it is for the market to make informed investment decisions. A clear implementation strategy setting out the phasing of development and the actions needed to deliver the requisite infrastructure can help in this regard. This implementation strategy could be provided through the allocations DPD with more detailed information being provided through an SPD/regeneration strategy or other implementation strategy document.

Summary

9.68 In total, around 20.8ha of land is proposed for allocation in Rossendale Borough over the period 2008-26. This is in excess of the 18.7ha which currently comprises the Borough's portfolio of committed employment land sites. If Site E33 (Croft End Mill, 0.6ha) and E14 (Barlow Bottoms, 3.54ha) are de-allocated as recommended, this would mean there would be 14.6ha of committed land remaining; suggesting a shortfall, in quantitative terms at least, of 6.2ha. This supports the overall recommendation that additional, albeit limited, provision is required for qualitative reasons, to better reflect patterns of market demand and potential across the Borough.

9.69 Based on the site assessments conducted as part of this study, the overall recommended portfolio of additional sites to meet future needs is set out below.

Table 9.6 Proposed Employment Site Portfolio

Potential Allocation	Site ref.	Site Address	Potential Uses	Size (ha)
A56/M66 Corridor				
0	-	No new allocations required	-	-
Rawtenstall				
3-4ha	E90	Former Accrington and Rossendale College	Office	0.7ha
	E75	Rossendale General Hospital	Office	Estimated 2 ha for employment
	-	New Site to be Investigated (in case either of above sites not available/suitable)	Office	1-2ha
Bacup / Waterfoot / Stacksteads				
2-3ha	E69	Futures Park Extension, Bacup	Industrial / Office	2.6ha
Facit and Whitworth				
0	-	No new allocations required	-	-

9.70 It is important to note that although demand is likely to be strongest in the **A56/M66 corridor**, it is considered that the portfolio is sufficiently extensive to cope with likely levels of demand for B1, B2 and B8 employment development to 2026.

9.71 In **Rawtenstall**, however, the need for an additional allocation of around 3-4ha is considered problematic, given the uncertainty regarding the suitability and availability of the better performing assessed sites. Although E90 (the former Accrington and Rossendale College site) is considered the best option employment site in the Borough and features in the Table, it has an extant permission for a hotel development and may be unavailable as a consequence.

9.72 Rossendale General Hospital (E75) was identified as potentially being suitable for a mixed-use development incorporating employment uses and is also identified in table 9.5. The site is constrained by its location within the Green Belt and by site specific development constraints. However, the site is substantially developed and meets the requirements for a Major Development Site, as outlined in PPG2 (Annex C). The redevelopment of the site in accordance with the guidance in PPG2 could maintain the openness of the gap between Rawtenstall and Haslingden. The issues identified above would require careful exploration ahead of any formal allocation in the Council's emerging LDF.

9.73 If the hotel permission on the Rossendale College site is implemented or if Rossendale General Hospital is found not to be suitable to redevelopment (or has less development capacity than estimated) then an alternative allocation should be sought through a further site review of Rawtenstall Town Centre as part of the LDF site allocations work.

9.74 The Valley Centre (E94) also has significant potential for redevelopment or partial redevelopment and indeed the site does have extant planning permission for a mixed use residential and retail led redevelopment and some office accommodation. The site would be suitable for further office development as part of a mixed-use development, but when the development is to come forward and for what uses is currently unclear.

9.75 Rossendale General Hospital (E75) is identified by Table 10.1 as having potential for approximately 2 hectares of employment development. This is a very approximate calculation of potential site capacity, which in accordance with Annexe C of PPG2 is based on an assumption that redevelopment of the site would not occupy a larger area of the site than the existing buildings. With approximately 4-5 hectares of the site currently occupied by buildings, it is assumed that approximately 2 hectares may come forward for employment use as part of a mixed-use development.

9.76 As regards **Bacup / Waterfoot / Stacksteads** sub-area, although demand here is comparatively weak, the current stock of committed employment land is extremely small relative to the size of the existing stock and hence a recommendation is made to support a formal allocation for the extension of the successful Futures Park, Bacup (E69, 2.6ha), albeit with the caveat that further detailed site investigation works will be required.

9.77 The portfolio in **Facit and Whitworth** is considered to exceed requirements (i.e. there is an over-supply). Demand is low and there is currently a relatively high supply of commitments in this area. No further allocations are recommended and we have recommended that site E14 (Barlow Bottoms) which is an existing allocation, is de-allocated. It is considered that deallocating this land and instead allocating further land in the greater demand sub-area of Rawtenstall would balance out Rossendale's employment land portfolio.

9.78 In assembling a new portfolio of sites, a cautious approach is required to managing the competing pressures on potential employment sites within Rossendale, balancing the aspirations for mixed-use development on some sites with the need to encourage renewal and intensification of the older industrial estates.

9.79 Renewal and intensification on older sites should be encouraged to ensure that they contribute positively to meeting some of Rossendale's employment land requirements, particularly given the challenges facing the identification of new allocations, but taking account of the particular constraints that apply on individual sites. Where mixed-use development or potential release of an employment site to other uses is contemplated, this should have regard to the availability of alternative sites to accommodate the relocation of firms.

10.0 Conclusions

10.1 The following conclusions and key messages can be drawn from the preceding sections of this study:

1. **Rossendale has a relatively small economy, which is continuing to undergo employment contractions.**

10.2 Rossendale is a predominantly rural area with four main economic centres and relatively few large firms. Over the last 30 years, the Rossendale economy has been characterised by slow or negative economic growth, a lack of local employment opportunities and long-term contraction of established local industries such as textiles, clothing and footwear. The legacy of industrial use has left many employment sites with remediation issues or the need for costly redevelopment for other uses.

10.3 Rossendale's economic strengths, which will influence its ability to support new employment space in future, include good transport accessibility to the M62 and the M65 corridors by virtue of the A56 which passes through the Borough; strong recent growth in business, financial and other service activities; low workplace wage levels (a strength from a potential employer's point of view); reasonable housing costs combined with proximity to attractive countryside; and improving rates of business start-up in recent years. Potential weaknesses and constraints to future growth include a smaller base from which to generate growth; its relatively low representation in office based sectors and knowledge based sectors; poor accessibility in the east of the Borough; the lack of any large town or flagship business location; over-representation in contracting sectors such as manufacturing and rapidly rising unemployment; competition from nearby economic centres, specifically Manchester; the small number of local jobs forcing many residents to commute elsewhere for work (especially for higher value jobs); and the low levels of inward investment into the Borough.

2. **The Borough has a modest level of employment space, with topographical constraints reducing the amount of available, developable, land.**

10.4 The vast majority of Rossendale's employment space is industrial, both factories (much of it former mill stock) and warehousing; the amount of commercial office space is very modest. Furthermore, the Borough has relatively little level land available for development and many existing sites adjoin the River Irwell and residential areas, and suffer from flooding and amenity issues as a result.

10.5 Rossendale Borough consequently has a low number of employment premises relative to neighbouring Boroughs, although this is partly due to its small population and a lack of a major urban centre. Some 95% of its current stock is made up of manufacturing and warehousing premises with a very low proportion of office space, although this broad pattern is fairly typical for Boroughs in this area. The Borough contains a reasonable range of industrial sites and areas but very little in the way of office sites. The stock of employment premises is also very dated.

10.6 There has been a moderate level of new employment space completed over the last 3 years, averaging almost 8,200 m^2 annually in gross terms, with the majority being B2 space. However, average losses of employment space (8,900 m^2 per annum) exceeded gains of new space.

10.7 There are a number of development proposals in adjoining Boroughs and in the wider North West region which have potential to compete with Rossendale for future employment development. In particular, the large strategic allocated sites close to the M62, such as Kingsway Business Park, will provide a wide range of modern industrial and distribution premises of all sizes with excellent road access, which have considerable potential to attract or divert some existing businesses and future investment away from Rossendale.

10.8 It is noted that 3,021 sq m of office space is under construction at Blackburn Road, Rising Bridge, illustrating some development in the office incubator sector .

3. Rossendale's future growth is likely to be characterised by indigenous demand for both industrial and office space, with perhaps a gradual shift towards smaller scale hi-tech and creative industries

10.9 Rossendale has experienced employment decline over the last decade in what has otherwise has been a period of economic buoyancy with strong growth at national and regional levels. Analysis of key sectors suggests the Borough has few obvious advantages over other parts of the sub-region. In the current, more challenging economic climate, consolidating the existing employment base should be a priority as well as building on local strengths to provide a platform for growth in the longer term.

10.10 Rossendale appears likely to remain reliant on its industrial sectors, although these are likely to face continuing decline in employment and space needs, even if they continue to be more resilient than the regional trend. Consolidation and modest growth in manufacturing will rely on greater specialisation and higher value, higher technology products while only low growth in locally based distribution appears likely.

10.11 Some modest growth in its service sector appears possible, whilst promotion of the Borough as an 'Adrenaline Gateway' could generate some niche opportunities for enterprises related to outdoor pursuits, as well as the visitor economy more generally. However, most of the growth is likely to come outside of the B-class uses.

10.12 Very few sectors were identified where anything more than low growth could be anticipated and no obvious areas of particular strength. More generally, the Borough's relative remoteness, small population, lack of a clear image as a business location and competition from surrounding areas suggest that attraction of large-scale office and industrial relocations is unlikely.

10.13 To capitalise on the relatively few future areas of growth and help deliver a sustainable economy, in the short to medium term at least, following the continued fall out from the recession, the focus for the Borough should be towards consolidation and enhancement of existing strengths and indigenous businesses (as has been the case at the Rising Bridge development). This suggests the need for greater emphasis on making provision for small and start-up businesses, and encouraging local business start-ups as well as facilitating expansion by established firms.

4. Business perceptions of Rossendale are not strong, and the commercial property market is therefore small-scale and relatively localised.

10.14 The Rossendale property market is fairly localised although there is some overlap with Greater Manchester and parts of the wider Pennine Lancashire sub region. The Borough benefits from relatively low cost accommodation compared with surrounding areas. Business perceptions of the Borough are generally fairly poor.

10.15 The A56 / M66 corridor and accessible locations around Rawtenstall and Haslingden is where demand for employment space is greatest, and where the better quality accommodation is generally located. There is a significant amount of older stock in the Rawtenstall to Bacup corridor and Whitworth, which no longer meets modern requirements.

10.16 The Borough continues to have a reasonably strong manufacturing base, despite a decline in traditional industries, and demand for industrial premises remained reasonably strong until the recent downturn. The very limited office market in Rossendale is predominantly focussed around Rawtenstall and the A56 / M66 corridor due to good road links and support infrastructure.

10.17 A gap in provision has been identified for small scale, modern office and industrial units, which offer an alternative from the multi-tenanted stock that has historically dominated the market in Rossendale. A lack of good quality grow-on accommodation for existing local businesses has also been identified although the demand for this recently has fallen off due to the economic recession.

10.18 In terms of future growth, demand for both industrial and office space will emerge from indigenous growth in the area as opposed to inward investment. Some potential is perceived by the market for an increase in small scale hi-tech and creative industries, potentially in the Rawtenstall to Waterfoot corridor. The general market view is that better use must be made of existing sites in order to support future growth.

5. **The District requires around 20.8ha to meet gross employment land needs up to 2026. This is in excess of the 14.6ha stock of committed employment land (after recommended de-allocations). Given the locational distribution of current sites, additional supply should be focused in and around Rawtenstall, and Bacup / Waterfoot / Stacksteads.**

10.19 The preferred growth forecast, Scenario 1 Severe Recession, suggests a need for -5.7ha (net), equating to 20.8ha (gross) once potential losses of employment land have been incorporated. This is in excess of the 18.7ha which currently comprises the Borough's portfolio of committed employment land sites. If Site E33 (Croft End Mill, 0.6ha) and E14 (Barlow Bottoms, 3.54ha) are de-allocated as recommended, this suggests a shortfall, in quantitative terms at least, of 6.2ha. This supports the overall recommendation that additional (albeit limited) provision is required for qualitative reasons to better reflect patterns of market demand across the Borough.

10.20 Based on the site assessments conducted as part of this study, the overall recommended portfolio of additional sites to meet future needs is set out in the table below.

Table 10.1 Proposed Employment Site Portfolio

Potential Allocation	Site ref.	Site Address	Potential Uses	Size (ha)
A56/M66 Corridor				
0	-	No new allocations required	-	-
Rawtenstall				
3-4ha	E90	Former Accrington and Rossendale College	Office	0.7ha
	E75	Rossendale General Hospital	Office	Estimated 2 ha for employment
	-	New Site to be Investigated (in case either of above sites note available/suitable)	Office	1-2ha
Bacup / Waterfoot / Stacksteads				
2-3ha	E69	Futures Park Extension, Bacup	Industrial / Office	2.6ha
Facit and Whitworth				
0	-	No new allocations required	-	-

10.21 Although demand is likely to be strongest in the **A56/M66 corridor**, it is considered that the portfolio is sufficiently extensive to cope with likely levels of demand to 2026.

- In Rawtenstall, the need for an additional allocation of around 3-4ha is problematic, given the uncertainty regarding the suitability and availability of the better performing assessed sites. Although E90 (the former Accrington and Rossendale College site) is considered the best option employment site in the Borough, it has an extant permission for a hotel development and may be considered unavailable. Although Rossendale General Hospital (E75) was identified as potentially being suitable for a mixed-use development incorporating employment uses, the site is constrained by its location within the Green Belt and by site specific development constraints. However, the site is substantially developed and meets the requirements for a Major Development Site, as outlined in PPG2 (Annex C). The redevelopment of the site in accordance with the guidance in PPG2 could maintain the openness of the gap between Rawtenstall and Haslingden. Consideration should be given to allocating the site as a major developed site. If the permission on the Rossendale College site is implemented or if Rossendale General Hospital is found not to be suitable to redevelopment (or has less development capacity than estimated) then an alternative allocation should be sought through a further site review of Rawtenstall Town Centre as part of the LDF site allocations work.
- In **Bacup / Waterfoot / Stacksteads**, although demand is comparatively weak, the amount of committed employment land is extremely small relative to the size of the existing stock and hence a recommendation is made to support a formal allocation for the extension of the successful Futures Park, Bacup (E69, 2.6ha), albeit with the caveat that further detailed site investigation works will be required.
- The portfolio in **Facit and Whitworth** is considered to exceed requirements. Demand is low and there is currently a relatively high supply of commitments in this area. No further allocations are recommended and we have recommended that site E14 (Barlow Bottoms) which is an existing allocation is de-allocated. It is considered that deallocating this land and instead allocating further land in the greater demand sub-area of Rawtenstall would balance out Rossendale's employment land portfolio.

7. Alongside making limited new allocations, the Council should adopt a proactive approach to managing and improving the existing portfolio of employment sites to facilitate future growth.

10.22 Renewal and intensification on older sites should be encouraged to ensure that they contribute positively to meeting some of Rossendale's employment land requirements, particularly given the challenges facing the identification of new allocations, but taking account of the particular constraints that apply on individual sites.

10.23 In assembling a new portfolio of sites, a cautious approach is required to managing the competing pressures on potential employment sites within Rossendale, balancing the aspirations for mixed-use development on some sites with the need to encourage renewal and intensification of the older industrial estates. Where mixed-use development or potential release of an employment site to other uses is contemplated, this should have regard to the availability of alternative sites to accommodate the relocation of firms.

Appendix 1 Glossary of Terms

1. **Employment Land:** Land allocated for business, general industrial and storage/distribution uses as defined by Classes B1, B2 & B8 of the Town and Country Planning (Use Classes) Order 1987 or with an extant planning consent for such uses. Employment uses exclude retail, leisure, residential care facilities, mineral extraction and waste disposal.
2. **B1a:** Offices other than in a use within Class A2 (Use Class Order 2005 Definition);
3. **B1b:** Research and Development – Laboratories, Studios (UCO 2005 Definition);
4. **B1c:** Light Industry (UCO 2005 Definition);
5. **B2:** General Industrial (UCO 2005 Definition);
6. **B8:** Storage or Distribution (UCO 2005 Definition).
7. **FTE:** Full Time Equivalent.
8. **Committed Employment Land:** All available land allocated for commercial/industrial employment uses or with extant planning permission for employment use, excluding (a) expansion land, (b) land with empty industrial buildings already in-situ, unless those buildings are time expired, and (c) special sites allocated for specific employment uses.
9. **Net Employment Land Requirement:** the difference between the likely amount of new employment land required, against the amount of land likely to be lost to non-employment uses over a stated period.
10. **Gross Employment Land Requirement:** the total amount of land likely to be required for employment uses over a stated period.
11. **Margin of choice:** the addition of a stated factor to the net land projections to ensure that businesses making locational choices have a degree of flexibility or choice.
12. **Gross Internal Floorspace:** The entire area inside the external walls of a building and includes corridors, lifts, plant rooms, service accommodation, but excludes internal walls (ODPM).

13. **Net Internal Floorspace:** The internal area of a building including entrance hallway, kitchens and built in units, but excluding toilets, stairways, lifts, corridors and common areas (ODPM)

14. **Land Immediately Available** - Land serviced or capable of being serviced in 12 months.

15. **Land Requiring Preparation** - Land where major provision of roads and utility services is required, or where major demolition and site remediation is required.

16. **Plot Ratio:** the ratio between gross floorspace and total site area.

17. **Employment Density**: average floorspace per worker ratios, usually expressed as square metres per worker.

18. **Historic Take-up:** The average yearly development of commercial/industrial land for employment uses over the last 10 - 25 years.

19. **Current Take-up:** The average yearly take-up of commercial/industrial land for employment uses over the last 5 years.

20. **Restricted Employment Sites:** Land in addition to general employment land allocations that is restricted for particular purposes such as airport and port expansion, chemical and steel industry, protecting land for potential rail freight interchanges and sites reserved for major users and inward investment.

21. **Implied Supply** - An estimate of the number of years that it would take to consume available land at prevailing take-up rates. It is calculated by dividing the amount of available land by the average yearly take-up.

Appendix 2 Economic Statistics

Table 1 Firms by Employment Size, 2007 (% of Total Firms).

Area	Employment size band								
	0-4	**5-9**	**10-19**	**20-49**	**50-99**	**100-249**	**250-499**	**500-999**	**1000+**
Rossendale	2,010 73.0%	345 12.5%	200 7.3%	130 4.7%	45 1.6%	20 0.7%	5 0.2%	0 0.0%	0 0.0%
North West	176,655 66.6%	39,590 14.9%	23,275 8.8%	15,920 6.0%	5,380 2.0%	2,920 1.1%	895 0.3%	315 0.1%	145 0.1%
GB	68.7%	14.2%	8.3%	5.4%	1.9%	1.0%	0.3%	0.11%	0.05%

Source: UK Business Activity, 2008, ONS

Table 2 Change in Employment by Borough 1998-2007.

Borough	1998	2007	% Change
Rossendale	**25,543**	**21,471**	**-15.9%**
Blackburn-with-Darwen	63,919	64,552	1.0%
Bury	58,579	63,063	7.7%
Rochdale	71,624	79,172	10.5%
Calderdale	82,209	82,666	0.6%
Burnley	36,882	34,285	-7.0%
Hyndburn	30,459	28,961	-4.9%
North West	**2,788,551**	**3,038,069**	**8.9%**
Great Britain	**24,354,983**	**26,599,195**	**9.2%**

Source: Annual Business Inquiry

Table 3 Employment by Industrial Sector (%).

Sector	Rossendale (%)		North West (%)	Great Britain (%)	
	1998	2007	2007	1998	2007
Agriculture	0.7	0.5	0.5	1.1	0.9
Energy & Water	0.2	0.2	0.4	0.8	0.7
Manufacturing	34.5	25.1	12.4	16.6	10.6
Construction	4.1	6.8	5.1	4.5	4.9
Distribution, Hotels & Catering	18.8	23.6	23.7	24.3	23.3
Transport & Communications	17.2	4.9	5.6	5.8	5.9
Banking, finance & insurance	7.6	13.3	19.4	18.6	21.6
Public Administration, education, health	14.9	21.1	28.2	23.6	26.9
Other Services	2.0	4.5	4.6	4.7	5.2
All Sectors	100.0	100.0	100.0	100.0	100.0

Source: Annual Business Inquiry

Table 4 Change in Employment Structure in Rossendale.

Sector	Rossendale			Great Britain
	1998 ('000s)	2007 ('000s)	change	1998 – 2007 (change)
Agriculture	0.1	0.1	-33.7%	-10.8%
Energy & Water	0.0	0.0	9.3%	-15.8%
Manufacturing	8.8	5.4	-39.0%	-30.2%
Construction	1.1	1.5	40.0%	16.5%
Distribution, Hotels & Catering	4.8	5.1	5.4%	5.0%
Transport and Communications	4.4	1.0	-76.2%	10.3%
Banking, finance and insurance	2.0	2.9	46.2%	27.5%
Public Admin education, health	3.8	4.5	19.2%	24.6%
Other Services	0.5	1.0	87.1%	21.7%
Total	**25.5**	**21.5**	**-15.9%**	**9.2%**

Source: Annual Business Inquiry

Table 5 Change in Number of VAT Registered Firms.

Area	1994	2008	1994-2008 (%)
Rossendale	1,980	2,240	13.1%
Lancashire	30,790	35,745	16.1%
North West	162,345	194,695	19.9%
Great Britain	1,566,635	1,964,920	25.4%

Numbers are start of year stock and are rounded to the nearest 5

Source: BERR, Enterprise Directorate, 2008

Table 6 VAT Registrations per 10,000 Population (16+), 2007.

Area	VAT Registrations per 10,000 population
Rossendale	45
Lancashire	35
North West	37
Great Britain	42

Source: BERR, Enterprise Directorate, 2008

Table 7 Unemployment Rates

Area	No. Unemployed	Unemployment Rate (%)	Long Term Unemployment Rate (%) **
Rossendale	1,740	4.2	3.5
Lancashire	24,968	3.5	4.6
North West	191,145	4.5	7.9
Great Britain	1,478,196	4.0	7.6

Source: NOMIS, ONS March 2009 **over 12 months as % of claimant unemployed

Table 8 Job Vacancies and Unemployment Indicators

Area	Notified Vacancies	No. of Claimant Unemployed	Unemployed/ Vacancy Ratio
Rossendale	117	1,740	14.9
Lancashire	4,076	24,968	6.1
North West	23,040	191,145	8.3
Great Britain	231,908	1,478,196	6.4

Source: NOMIS, March 2009

Table 9 Economic Activity & Income Support

Area	Economic Activity rate (%)	Benefit claimants * (%)
Rossendale	81.8	15.3
Lancashire	79.2	14.2
North West	76.8	17.3
Great Britain	78.7	13.9

Source: Annual Population Survey (12 months to March 2008); DWP Benefit Claimants May 2008

* Note: includes job seeker, incapacity, lone parent and other benefits

Table 10 Occupational Breakdown of Labour Force.

Occupational Group	Rossendale (%) *	North West (%)	GB (%)
Managers/senior officials	19.2	14.1	15.3
Professional occupations	11.7	12.1	13.1
Associate professional & technical	14.8	13.9	14.6
Administrative & secretarial	15.0	12.4	11.6
Skilled trades	4.0	10.4	10.9
Personal service occupations	9.8	8.2	8.0
Sales & customer service occupations	7.7	8.5	7.6
Process plant & machine operatives	10.6	8.4	7.2
Elementary occupations	7.1	11.6	11.4

Source: Annual Population Survey (12 months to March 2008) * Note: totals rounded

Table 11: Qualifications of Working Age Residents.

Area	% of Residents with no Qualifications *	% of Residents with Degree or Higher Qualification *
Rossendale	12.3	22.3
North West	15.0	25.4
GB	13.1	28.6

Source: Annual Population Survey, 2007 * Persons aged 17 - 64

Table 12 Sought Occupation of Claimant Unemployed Workers.

Sought Occupation	Rossendale	North West (%)	GB (%)
Managers / Senior Officials	50 (5%)	3.7	4.2
Professional Occupations	35 (4%)	2.9	3.1
Associate Prof./ Technical	55 (6%)	5.3	6.4
Administrative / Secretarial	90 (9%)	9.6	10.8
Skilled Trades Occupations	120 (12%)	11.3	11.6
Personal Service Occupations	45 (5%)	5.0	5.1
Sales and Customer Service Occupations	115 (12%)	15.2	15.6
Process Plant/Machine Operatives	130 (13%)	10.9	11.0
Elementary Occupations	330 (34%)	35.9	31.9
Occupation Unknown	0 (0%)	0.1	0.2
Total	**965 (100.0%)**	100.0	100.0

Source: ONS, NOMIS, October 2008

Table 13 Median Gross Weekly Earnings of Full Time Employees.

Area	Resident Based Earnings		Workplace Based Earnings	
	Median Weekly Earnings (£)	As a % of GB Average	Median Weekly Earnings (£)	As a % of GB Average
GB	391.0	100	390.0	100
North West	371.4	95	372.1	95
Lancashire	375.5	96	366.1	94
Rossendale	**373.2**	**95**	**298.1**	**76**

Source: Annual Survey of Hours and Earnings, 2008

Table 14 Deprivation Indices for Rossendale and surrounding Districts.

District/Borough	Rank of average score (out of 354 Districts)
Rossendale	**92**
Blackburn-with-Darwen	17
Bury	122
Rochdale	25
Calderdale	107
Burnley	21
Hyndburn	40

Source: The English Indices of Deprivation, 2007

Table 15 Commuting Patterns in Rossendale, 2001.

2001	Live in Rossendale:		
			%
	Total	**29,791**	**100.0**
Work in:	Rossendale	15,856	53.2
	Rochdale	2,524	8.5
	Bury	1,925	6.5
	Manchester	1,438	4.8
	Hyndburn	1,409	4.7
	Burnley	1,336	4.5
2001	**Work in Rossendale:**		
			%
	Total	**22,915**	**100.0**
Live in:	Rossendale	15,856	69.2
	Hyndburn	1,242	5.4
	Bury	1,228	5.4
	Rochdale	851	3.7
	Burnley	796	3.5

Source: 2001 Census

Table 16 Self-containment Rates for Rossendale and Surrounding Boroughs.

Borough	% of Residents Working in own Borough
Rossendale	**53.2%**
Blackburn-with-Darwen	71.0%
Bury	51.7%
Rochdale	62.4%
Calderdale	72.1%
Burnley	66.1%
Hyndburn	55.8%

Source: Census 2001 Workplace Data

Table 17 Investment Enquiries in Rossendale by Type and Size.

Size/type of premises sought (sq m)	*Up to 92*	*93 – 278*	*279 – 464*	*465 – 929*	*930 – 2,322*	*2,322+*	Total
Industrial	5	46	10	19	27	12	119
Office	14	14	2	2	5	3	40
Total B use enquiries	**19**	**60**	**12**	**21**	**32**	**15**	**159**

Source: Availability and Demand Report

* Note: covers period 2005 to 2007

Table 18 Total amount of employment land available for industrial/commercial use.

Borough	Total Land (ha)	B1	B2	B8	Mixed B
Rossendale	**20.6**	12.6	0.6	7.2	0.2
Blackburn-with-Darwen	**64.4**	16.72	11.69	4.52	31.46
Bury	**16.0**	2.44	0.22	0	13.35
Rochdale	**169.0**	0	0	0	169.0
Calderdale	**88.1**	18.17	57.23	12.62	0
Burnley	**57.8**	5.34	0.00	0.00	52.42
Hyndburn	**98.0**	5.10	2.11	0.10	90.64

Source: 2007/8 Annual Monitoring Report and Calderdale Annual Monitoring Report 2006/7

Note: only includes sites over 0.4 ha in size

Table 19 B-Class Employment Floorspace, 2007.

	Commercial Offices		**Factories**		**Warehouses**		**Total**	
	‘000 m^2	m^2 per capita	‘000 m^2	m^2 per capita	‘000 m^2	m^2 per capita	‘000 m^2	m^2 per capita
Rossendale	47	0.70	514	7.7	273	4.1	834	12.4
Blackburn-with-Darwen	146	1.04	1,304	9.3	586	4.2	2,036	14.4
Bury	96	0.52	876	4.8	465	2.5	1,437	7.8
Rochdale	115	0.56	1,357	6.6	1,287	6.2	2,759	13.4
Calderdale	282	1.41	1,533	7.7	847	4.2	2,662	13.3
Burnley	89	1.02	696	8.0	430	4.9	1,215	13.9
Hyndburn	57	0.70	652	8.0	393	4.8	1,102	13.4

Source: Nomis/VOA, 2007:

Note: Per Capita figures are based on the 2007 resident population; ‘Commercial Offices’ includes purpose built and converted offices including central Government but not local government offices

Appendix 3 Maps showing sites categorised by type

Appendix 4 Site Appraisal Sheets

Appendix 5 Maps showing sites categorised by recommendations