

Richmondshire District Council
Employment Land Review
Report

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1 Introduction

1.1 Purpose of the Employment Land Review

Richmondshire District Council appointed Edge Economics and Arup to prepare an Employment Land Review (ELR) as part of establishing the evidence base to support a new Local Plan. The new Local Plan will guide development in the part of the District outside of the Yorkshire Dales National Park (YDNP) to 2035.

The new Local Plan will represent a review of the Richmondshire Local Plan 2012 – 2028 (Core Strategy). Any revision to the economic strategy and policy approach for the District needs to be supported by robust and proportionate evidence. Enabling economic growth continues to be a key priority for the Council. The Council produced an update to the Arup Employment Land Review (2007) in 2012; with the update prepared to support the Council through the Local Plan Core Strategy Independent Examination. A new ELR is now timely given the overall change in economic environment across the UK and three specific key local economic drivers:

1. The imminent completion of the A1 upgrade, making the District more accessible to wider markets;
2. The recent Ministry of Defence (MOD) announcement that Catterick Garrison will receive around 4,900 additional service personnel and their dependents up to 2035; and
3. The expected completion of a Designer Retail Outlet at Scotch Corner in late 2019/early 2020.

The ELR further interrogates these drivers to understand the economic impacts on the District.

The ELR recommends a specific amount of employment land for the District and focuses on the needs in terms of B Use Classes (offices, manufacturing and warehousing/ distribution). Its development is underpinned by stakeholder engagement and provides a basis for an employment land trajectory to 2035.

1.2 Scope of the study

The overarching aim of the study is to provide a robust evidence base on employment land for Richmondshire District's functional economic area and its sub areas.

Our approach is based on guidance within the National Planning Policy Framework (NPPF) and the Planning Practice Guidance (PPG).

Accordingly, it develops the evidence base in relation to:

- The need for land or floorspace for economic development, including both the quantitative and qualitative need for all foreseeable types of economic activity over the plan period; and
- The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs.

The ELR considers the period to 2035. It forms the basis of planning policies for the retention, regeneration, or re use of existing employment land, and for allocations for new employment land for B1, B2 and B8 uses (as defined by the Town and Country

Planning (Use Classes) Order 1987 (as amended) and the Town and Country Planning (General Permitted Development) Order 1995 (as amended)). It also advises on the appropriate overall amount, type, and distribution of employment land including an assessment of existing provision.

1.3 Key stages of the methodology

The key stages of our methodology adopted in producing the ELR were as follows:

1. Confirm study parameters and key issues
2. Review and Consolidation of Existing Employment Site Data
3. Agree Site Assessment Methodology and Proforma
4. Site Assessment
5. Assessment Review
6. Market Analysis
7. Economic Analysis and Baseline Scenario
8. Scenarios for Employment Growth
9. Employment Scenario Testing
10. Translating economic forecasts into land requirements
11. Final reporting and conclusions on land requirements
12. Recommendations to revise planning policy

1.4 Structure of this report

The remainder of this ELR is structured as follows:

- Section 2 sets out the policy context;
- Section 3 outlines the economic context;
- Section 4 outlines the property market context;
- Section 5 reports the findings of the site assessments;
- Section 6 explores the future requirements for employment land;
- Section 7 considers the demand-supply balance and implications for employment land needs over the plan period; and
- Section 8 provides a summary of the key conclusions.

Further supporting material is provided in the Appendices.

2 Policy Context

2.1 Overview

This section provides a summary of the key planning policy and economic strategy documents that form the background policy context to the ELR. The ELR takes into account the key priorities of these documents.

2.2 National

National Planning Policy Framework (2012)

The National Planning Policy Framework (NPPF, March 2012) emphasises the weight to be given to planning for economic development:

“Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system.

To help achieve economic growth, local planning authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century.”

[NPPF Paragraphs 19 and 20]

More specific guidance on factors to be considered when undertaking an ELR and the nature of ELR outputs are provided at paragraph 21 of the NPPF:

“Planning policies should recognise and seek to address potential barriers to investment, including a poor environment or any lack of infrastructure, services or housing. In drawing up Local Plans, local planning authorities should:

- *Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;*
- *Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;*
- *Support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;*
- *Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;*
- *Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and*
- *Facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.”*

[NPPF Paragraph 21]

Councils are urged to be flexible and responsive to “market signals” (paragraph 22):

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

Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.”

[NPPF Paragraph 22]

It is the role of the ELR process to consider why long-standing employment allocations have not come forward and if so, whether a flexible approach to development on these sites would be more appropriate.

Using a proportionate approach to the evidence base is also a key tenet of the NPPF:

“Each local planning authority should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. Local planning authorities should ensure that their assessment of and strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals.”

[NPPF Paragraph 128]

The importance of engagement with the Local Enterprise Partnership (LEP), neighbouring authorities and the business community is emphasised in the NPPF:

“Local planning authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this, they should:

- work together with county and neighbouring authorities and with Local Enterprise Partnerships to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market; and*
- work closely with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing, infrastructure or viability.”*

[NPPF Paragraph 160]

The NPPF states that the evidence base should be used to consider several factors, including the need for employment land and the existing and future supply:

“Local planning authorities should use this evidence base to assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure*

development;

- *the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land;”*

[NPPF Paragraph 161]

Public bodies have a duty to cooperate on planning issues that cross administrative boundaries. The NPPF requires that local authorities to demonstrate evidence of having effectively cooperated to plan for issues with cross-boundary impacts when their local plans are submitted for examination:

“Local planning authorities will be expected to demonstrate evidence of having effectively cooperated to plan for issues with cross-boundary impacts when their Local Plans are submitted for examination. This could be by way of plans or policies prepared as part of a joint committee, a memorandum of understanding or a jointly prepared strategy which is presented as evidence of an agreed position.

Cooperation should be a continuous process of engagement from initial thinking through to implementation, resulting in a final position where plans are in place to provide the land and infrastructure necessary to support current and projected future levels of development.”

[NPPF Paragraph 181]

Planning Practice Guidance (2014)

Planning Practice Guidance (PPG) includes guidance on the assessment of housing and economic development. This replaces the previous ODPM Employment Land Reviews: Guidance Note from 2004.

The PPG provides a methodology for assessing economic development needs. It states that plan makers should liaise closely with the business community to understand their current and potential future requirements.

Plan makers should also consider:

- The recent pattern of employment land supply and loss to other uses;
- Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums);
- Market signals such as levels and changes in rental values, and differentials between land values in different uses;
- Public information on employment land and premises required;
- Information held by other public sector bodies and utilities in relation to infrastructure constraints;

- The existing stock of employment land (though it is important to recognise that this may not reflect the future needs of business);
- The locational and premises requirements of particular types of business; and
- Identification of oversupply and evidence of market failure.

In relation to the recent take-up of employment land, PPG advises that it is important to consider projections (based on past trends) and forecasts (based on future scenarios) and identify occurrences where sites have been developed for specialist economic uses. In forecasting future trends, PPG advises that:

- Plan makers should consider forecasts of quantitative and qualitative need, but also its particular characteristics;
- Local authorities should develop an idea of future needs based on a range of data which is current and robust;
- Emerging sectors that are well suited to the area being covered by the analysis should be encouraged where possible; and
- The available stock of land should be compared with the particular requirements of the area so that ‘gaps’ in local employment land provision can be identified.

PPG advises that plan makers should also consider:

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

In identifying the type of employment land needed, PPG advises that:

- The need for rural employment should not be overlooked;
- Underlying population projections can be purely demographic or tied to future housing stock which needs to be assessed separately; and
- Plan makers should be careful to consider that national economic trends may not automatically translate to particular areas with a distinct employment base.

In order to derive employment land requirements, PPG states that when translating employment and output forecasts into land requirements there are four key relationships that need to be quantified:

1. Standard Industrial Classification sectors to use classes;
2. Standard Industrial Classification sectors to type of property;
3. Employment to floorspace (employment density); and
4. Floorspace to site area (plot ratio based on industry proxies).

Within this study a range of economic forecasts are presented to enable the consideration of different growth scenarios (see Section 6).

Planning for the right homes in the right places & draft revised National Planning Policy Framework

In seeking to understand the balance of housing and economic needs in Richmondshire it is important to reference the two recent consultations held by the Ministry for Housing, Communities and Local Government (MHCLG).

MHCLG introduced a standardised methodology for assessing housing need as part of the ‘Planning for the right homes in the right places’ consultation and this standard methodology has since been re-stated in the consultation on the draft revised NPPF and draft revised NPPG.

The draft-standardised methodology first published in September 2017 was accompanied by an indicative assessment of need for each local authority area. For Richmondshire, the figure set out was 14 dwellings per annum between 2016 and 2026. It should be noted that the standard method calculation is based on the mid-2014 population and household projections that make incorrect migration assumptions due to changes in the military population. The Council’s current housing requirement is 180 dwellings per annum over the period 2012 to 2028.

Clearly there is a significant disparity between the figures, and any move towards accepting the standardised methodology would give rise to a significantly different development strategy. Furthermore, it would require the economic development strategy and approach to delivering employment land to be fundamentally altered. The lower housing need figure would require a commensurate reduction in employment land delivery so as to create an overall balance between the number of homes and jobs in the district, and ensure that sustainable patterns of development took place, and did not inadvertently, or unintentionally result in unsustainable commuting patterns.

The Council has yet to calculate and finalise its future objectively assessed need for housing. The findings of this Employment Land Review will influence the overall considerations of need. It is important, however, that economic needs and housing needs are considered in the round, and in conjunction; so as to avoid an imbalance between the local labour force and the resident population.

The draft revised NPPF also sets out revised text in relation to ‘building a strong, competitive economy’, and seeks to make the existing NPPF Paragraph 82 and Paragraph 83 more explicit – to express the importance of supporting business growth and improved productivity (linked to the government’s existing Industrial Strategy).

2.3 Sub regional

York, North Yorkshire and East Riding LEP Strategic Economic Plan (2014)

The Strategic Economic Plan (SEP) is a single strategy for the LEP. The strategy sets out the key economic issues, opportunities and priorities for the area. It represents the key strategic document which sets the context for the LEP’s investment of EU funds and those secured from Central Government through the Local Growth Deal.

The SEP sets out the overarching vision “to make York, North Yorkshire & East Riding the place in England to grow a small business, combining a quality business location with a great quality of life”. To support this, the SEP is built around five strategic priorities:

1. Profitable and ambitious small and micro businesses;
2. A global leader in food manufacturing, agri-tech and biorenewables;
3. Inspired People;
4. Successful and distinctive places; and
5. A well-connected economy.

The SEP set out four clear ambitions to deliver by 2021:

- Create 20,000 new jobs;
- Deliver £3 billion growth;
- Connect every student to business; and
- Double house building.

The activities outlined in the SEP fall within four geographies:

- A1/A19 Growth Corridor;
- Yorkshire Coast;
- Dales, Moors and Wolds; and
- Links to neighbouring cities.

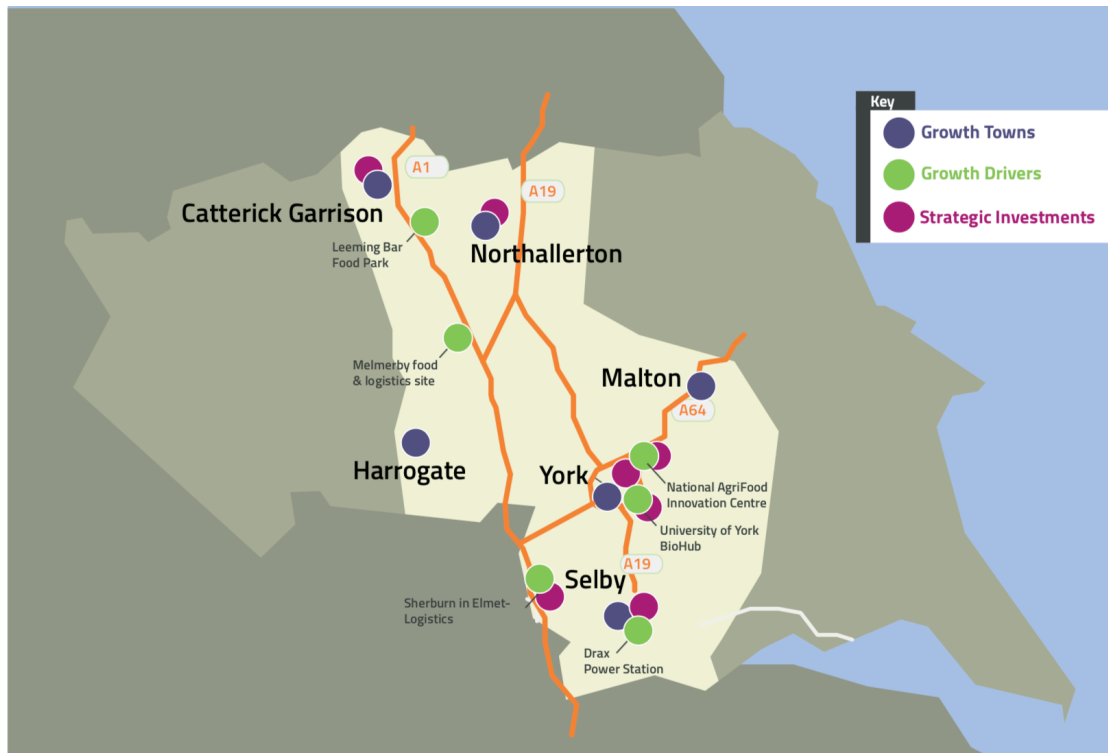
Within each of these areas, the LEP worked with local planning authorities and stakeholders to identify the towns and opportunities where growth is most likely to be focused. The SEP states that investments will be targeted towards these Growth Towns. The growth towns are: Selby, Harrogate, York, Malton, Northallerton, and Catterick. A 5-year growth plan has been developed for each of these towns.

Of direct relevance to the area of Richmondshire outside the National Park (the scope of this ELR) is the 'A1/A19 Growth Corridor' area.

The A1/A19 corridor runs through the heart of the LEP area and was the focus of the LEP's 2015/16 programme of investment. The SEP highlights that the corridor contains major strategic sites, allocated within Local Plans and with approved planning, but where exceptional infrastructure costs are stopping or delaying development. Removing these barriers is identified as essential to delivering the LEP's aim of doubling house building rates, increasing the level of affordable housing, whilst providing employment land to support future growth.

In Richmondshire, in the north of the corridor, Catterick Garrison is identified as providing the opportunity for major housing growth and a new town centre.

Figure 2.1: A1/A19 Growth Corridor



Source: YNYER Strategic Economic Plan (2014).

York, North Yorkshire and East Riding LEP Strategic Economic Plan Update (2016)

The SEP Update takes stock of progress made since the 2014 Strategic Economic Plan and refines the LEP’s strategy going forward.

The SEP Update notes that the area has performed strongly in relation to job creation, having already exceeded the overall jobs target. It is highlighted however that since 20,000 of the jobs created in 2012-2014 were in the low paid sectors of tourism, retail, care and administration, there is a challenge to deliver well-paid jobs.

In particular, the SEP Update includes a refining of the LEP’s job creation target to focus on creating better quality jobs and increasing the productivity of businesses. It adds two interlinked targets for greater focus over the next period:

1. To narrow the gap between the area’s median wages and national average; and
2. To narrow the gap between the area’s productivity and national average.

This responds to the issue of productivity and wage levels lagging behind the national average.

The strategic approach remains focussed on small and micro businesses that are a major driver of growth in the LEP area. Under Priority 1 “Profitable & Successful Businesses”, two objectives are set out:

1. To make it simpler for people running businesses to be successful; and
2. To establish a sustainable system to support business improvement, making the most of the private sector, investing limited public funds in a highly prioritised manner.

Overall, the focus for action set out in the SEP Update is broadly the same as the 2014 Strategic Economic Plan.

2.4 Local

Richmondshire Joint Employment Land Review (2007)

The Richmondshire Joint Employment Land Review (JELR) was undertaken in 2007 to form part of the evidence base for the Richmondshire Local Development Framework.

The JELR was undertaken in the context of significant anticipated change in relation to key economic drivers in the District. Catterick Garrison was expected to become a “Super Garrison” with an associated growth in population from around 13,000 to 25,000 by 2021. A major upgrade of the A1 was also expected.

The JELR projected future employment land requirements based on economic forecasts with a 2004 baseline. This preceded rapid economic growth in the period 2004-2008. Overall employment in Richmondshire was projected to grow by 12% over the period 2006-2021. A significant amount of this growth was forecast in sectors not reliant on the allocation of employment land however.

The JELR estimated that 11.75 hectares of net additional employment land would be required in the District over the period 2006 to 2021. Of this, 8.66 hectares was needed in the LDF plan area and the remainder in the National Park. An additional 3.4 hectare requirement was identified for military related expansion.

The JELR identified 51.3 hectares of gross vacant employment land remaining across Richmondshire, 60% of which was in Colburn and Catterick. At the time, much of this land was also being considered for alternative (non-economic development related) uses. The JELR identified 33.8 hectares of allocated employment land that remained undeveloped. The majority of this, including Colburn Business Park and other sites in the Catterick Garrison area, was assumed to be attractive to investors.

It was concluded that the majority of this additional land provided should be located at Colburn and Catterick to support demand arising from the Garrison expansion and A1 re-alignment, and to meet the needs of inward investors. It was acknowledged that demand may not increase until the medium term however.

Richmondshire Employment Land Review Update (2012)

The Council carried out an update to its ELR in 2012 for the Local Plan Core Strategy Examination in Public (the Core Strategy was adopted in 2014).

The ELR Update was undertaken in the context of a very different economic environment to that of the 2007 JELR. Catterick Garrison did not grow as expected in terms of the ‘Super Garrison’ vision and the A1 upgrade was cancelled. More broadly, the general economy peaked in 2006-2008 followed by the onset of the late 2000s recession. Consequently both regional and national forecasts for economic growth and employment were being reduced at this time.

The REM forecasts used in the ELR Update projected substantially less growth in employment than those in the 2007 JELR (+6.5% to compared with 12.0%) over the periods considered. The projections indicated a decline in jobs in traditional employment land use consuming industries (B1, B2, B8). The need for employment land over the plan period was identified as likely to come from Other Financial and

Business Services, Wholesaling, Transport and Construction. It was also noted that non-B Class uses, including Retailing, accounted for the majority of projected employment growth.

The ELR Update noted that the development of allocated sites had been slower than expected in the 2007 JELR and that 25 hectares of allocated employment land remained undeveloped. The ELR Update set out the status of the employment allocations from the previous Local Plan 1999-2006. Of the 33 hectares allocated, 8 hectares had been developed and 25 hectares remained undeveloped (although 7 hectares of this had permission for development). It was concluded that the current vacancies at the time indicated further capacity for employment growth.

Richmondshire Council Plan 2015-2019 (revised 2016)

Enabling growth is a priority for the Council, with the focus on promoting growth of the local economy and enabling businesses to set up and grow.

The Richmondshire Economic Action Plan 2016 – 20 focuses on four priority areas:

- Enabling opportunities for growth;
- Supporting local business and tourism;
- Improving connectivity; and
- Advocating the District for economic growth.

This includes encouraging and supporting new retail providers within Richmondshire; supporting the Market Towns; and promoting existing Town Centres and emerging developments such as Catterick Garrison and the Designer Outlet at Scotch Corner.

Richmondshire Local Plan 2012-2028 (Core Strategy, 2014)

The Richmondshire Local Plan 2012 – 2028 (Core Strategy) was adopted in December 2014. It serves as the development plan for Richmondshire, and provides the growth and regeneration strategy for the District.

The Local Plan contextualises the ambitions for the District, outlining the challenges and opportunities that exist. In doing so, the Local Plan highlights a number of important considerations that affect growth and development in the District:

- The District's location relative to the Yorkshire Dales National Park, Tees Valley, Darlington, Durham Dales, and the rural areas of North Yorkshire;
- The District's proximity and accessibility to major transport corridors and strategic road routes, such as the A1, A66, A167, and A684 – and how planned upgrades to the A1 provide a significant opportunity to enable future development proposals;
- The inter-relationship between the market towns and main centres of population of Richmond, Catterick Garrison (including Hipswell, Scotton, and Colburn), Leyburn; and the large number of small villages spread across the District;
- The overall influence of the military presence in the District through main sites at Catterick Garrison and Marne Barracks; as well as the consequences of the Ministry of Defence (MOD) plans for the long term role and function of the sites and the knock-on effects for the housing market, economic prosperity, and provision of services and facilities (e.g. education and health);

- An increasingly aged population, even accounting for the growing influence of military service personnel (and their families); and a concentration of population within the main settlements;
- The diverse nature of the economy, with a continued role for agriculture, but with increasing emphasis on service sectors, and the heightened influence of the MOD – in terms of direct employment, and also in terms of driving indirect economic activity linked to retail and leisure;
- The high value of the natural environment – with parts of the District falling within and adjacent to the Yorkshire Dales National Park, other protected landscapes and natural assets, such as the Nidderdale and North Pennines Area of Outstanding Natural Beauty (AONB), a number of Sites of Special Scientific Interest (SSSI), the North Pennine Dales Meadows Special Conservation Area (SAC), as well as numerous local wildlife and nature designations, green and ecological corridors; and
- The high value of the built and historic environment – with regionally significant assets, such as Richmond Castle, over 40 conservation areas, over a 1,000 listed buildings, over 1,200 archaeological sites listed on the North Yorkshire Historic Environmental record (HER), and a legacy of rural heritage framed by centuries of agricultural land workings, and the influence of prominent country estates.

The Local Plan sets out a five ‘spatial principles’ and 14 ‘core policies’ that guide development across three sub-areas (Central Richmondshire, Lower Wensleydale and North Richmondshire). Each sub-area is accompanied by a ‘Sub-Area Strategy’.

The relationship between the three sub-areas, and the identified settlement hierarchy that exists in Richmondshire is outlined in Spatial Principle 2 (SP2). Policy SP2 differentiates between the different levels of the spatial hierarchy, setting out:

- ‘Principal Towns’ of Richmond and Catterick Garrison (that will be the main focus for growth in the Local Plan);
- ‘Local Service Centre’ of Leyburn (that will service its surrounding area, and provide a functional link to the YDNP);
- ‘Primary Service Villages’ of: Brompton on Swale, Catterick Village and Scorton; Middleham; and Barton, Melsonby and Middleton Tyas (that will meet the needs of the dispersed rural community); and
- ‘Secondary Service Villages’ of: Finghall-Harmby-Spennithorne, and Hunton; and Aldbrough-Caldwell-Eppleby, Dalton-Newsham-Ravensworth, Gilling West, and North Cowton (that will provide fewer services to meet local rural needs).

A summary of the specific Local Plan policies that influence aims for economic growth and employment land delivery is set out in Appendix 1.

Richmondshire Local Plan (2014 – 2035)

The Council began the process of preparing a new Local Plan in 2017. The revised Local Plan will look across the period 2014 – 2035 and will include detailed policies, a masterplan for Catterick Garrison, and site allocations for housing, economic development, retail and leisure, and community facilities.

In revising the Local Plan, the Council will prepare a new objectively assessed need for both economic and housing needs. The Economic Needs Assessment will be influenced by the analysis and conclusions reached in this Employment Land Review.

The revised Local Plan will also determine the objectively assessed need for housing and devise a combined policy approach for delivering against both housing and economic development needs.

Summary

- The NPPF and NPPG provide guidance on developing the evidence base for employment land needs;
- The draft revised NPPF makes the existing NPPF Paragraph 82 and Paragraph 83 more explicit – to express the importance of supporting business growth and improved productivity;
- The York, North Yorkshire and East Riding LEP’s Strategic Economic Plan (SEP) identifies the A1/A19 Growth Corridor as a priority. Also that investment will be targeted at ‘Growth Towns’ including Catterick Garrison specifically to capitalise on the opportunity for major housing growth and a new town centre;
- A 5-year Growth Plan for Catterick Garrison is outlined in the SEP with the A1 upgrade and Catterick Garrison Town Centre development being highlighted as opening the way to developing a strong District Centre made up of Catterick Garrison and historic Richmond;
- The LEP’s strategy remains focussed on small and micro businesses that are a major driver of growth in the LEP area. It has refined its job creation target to focus on creating better jobs and increasing the productivity of businesses;
- The Richmondshire Joint Employment Land Review (JELR) undertaken in 2007 estimated that 11.75ha of net additional employment land would be required over the period 2006 to 2021. Of this, 8.66ha was needed in the LDF plan area and the remainder in the National Park;
- The JELR identified 51.3ha of gross vacant employment land remaining across Richmondshire, 60% of which was in Colburn and Catterick. At the time, much of this land was also being considered for alternative (non-economic development related) uses and 33.8ha of allocated employment land remained undeveloped;
- The JELR concluded that the majority of the additional land provided should be located at Colburn and Catterick to support demand arising from the Garrison expansion and A1 re-alignment;
- The Council carried out an update to the ELR in 2012. The ELR Update was undertaken in a very different economic environment to that of the 2007 JELR (Catterick Garrison did not grow as expected and the A1 upgrade was cancelled);
- The ELR Update noted that the development of allocated sites had been slower than expected in the 2007 JELR. The ELR Update set out the status of the employment allocations from the previous Local Plan. Of the 33ha allocated, 8 hectares had been developed and 25ha remained undeveloped (although 7ha of this had permission for development);
- Enabling growth is a priority for the Council with the focus on promoting growth of the local economy and enabling businesses to set up and grow;
- The Richmondshire Local Plan 2012 – 2028 highlights important considerations that affect growth and development in the District (see Appendix 1).

3 Economic Context

3.1 Overview

This section provides a summary of the economic context in Richmondshire. The analysis includes review of the District's geography and key connections, review of trends in key economic indicators, drivers of change and the implications for the Functional Economic Market Area (FEMA).

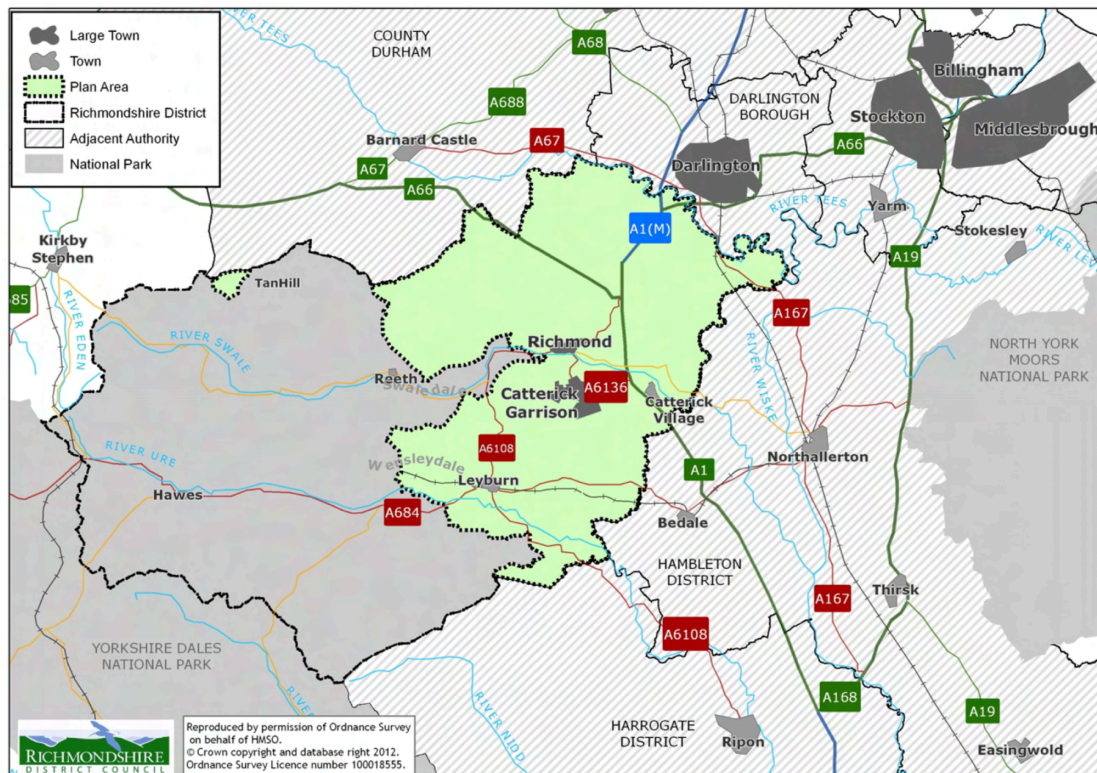
The findings are important in informing the scenarios for future employment growth in the District detailed in Section 6.

3.2 Geography and connections

Richmondshire District is located in North Yorkshire and is predominantly rural in character. The western part of the District is situated within the Yorkshire Dales National Park (YDNP). The following figure shows the Plan Area that the ELR relates to.

Richmondshire has one of the smallest populations of any local authority (ranking 317 of 326 districts with 53,700 residents¹) but covers one of the largest geographic areas. The District is characterised by a good quality of life and rich natural environment. Key road connections in the District include the A1 that runs north-south through its eastern part providing access to Tees Valley and the A684 that runs east-west through the Yorkshire Dales National Park.

Figure 3.1: Richmondshire Plan Area for ELR



Source: RDC.

¹ 'Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2016', ONS.

A brief overview of Richmondshire's key settlements can be summarised as follows:

- **Richmond** - Richmond is the historic administrative and service centre of the District. It has a population of around 8,400 people². Key attractions in the town include the Georgian Theatre Royal and Richmond Castle. Due to its historic environment, opportunities for physical expansion in Richmond are relatively limited;
- **Catterick Garrison and Colburn** – The area generally known as Catterick Garrison includes the parishes of Hipswell, Scotton and Colburn as well as the Catterick Garrison main military site. Catterick Garrison is the largest British Army Garrison and has a population of around 12,000. In policy terms, it is considered to have the capacity for balanced development of housing, employment and town centre facilities. Colburn is located close to Catterick Garrison Town; and
- **Leyburn** - Leyburn is a market town in Wensleydale with a population of about 2,200 residents. Leyburn offers a range of facilities including shopping, education and offices. It is also home to Tennants Auctioneers, the largest auction house in Europe. Leyburn is a significant tourist destination with its population swelling in summer months. It has featured in the Tour de France and 2012 Olympics torch relay. The economy has diversified to compensate for the decline in local quarrying employment (Leyburn Business Park has been particularly important in supporting this diversification).

3.3 Economic conditions

Economic activity

Data from the 2011 Census shows that Richmondshire has an economic activity rate of 75.1% (as a proportion of all residents aged 16-74). This is higher than the comparable rates for the Yorkshire and Humber region (68.4%) and England (69.9%).

The latest Claimant Count data for March 2018 shows that Richmondshire has a claimant count rate (claimants as a proportion of residents aged 16-64) of 1.4. This is lower than rates recorded in the Yorkshire and Humber region (2.5) and England (2.1).

Employment

The Business Register and Employment Survey (BRES) provides a measure of workplace based employment.

In analysing trends in employment in the District using BRES data there are some important factors to note.

First, BRES data excludes members of the armed forces. The figures therefore exclude MOD uniform employment at Catterick Garrison in Richmondshire. The figures include MOD non-uniform employment (civil servants) however.

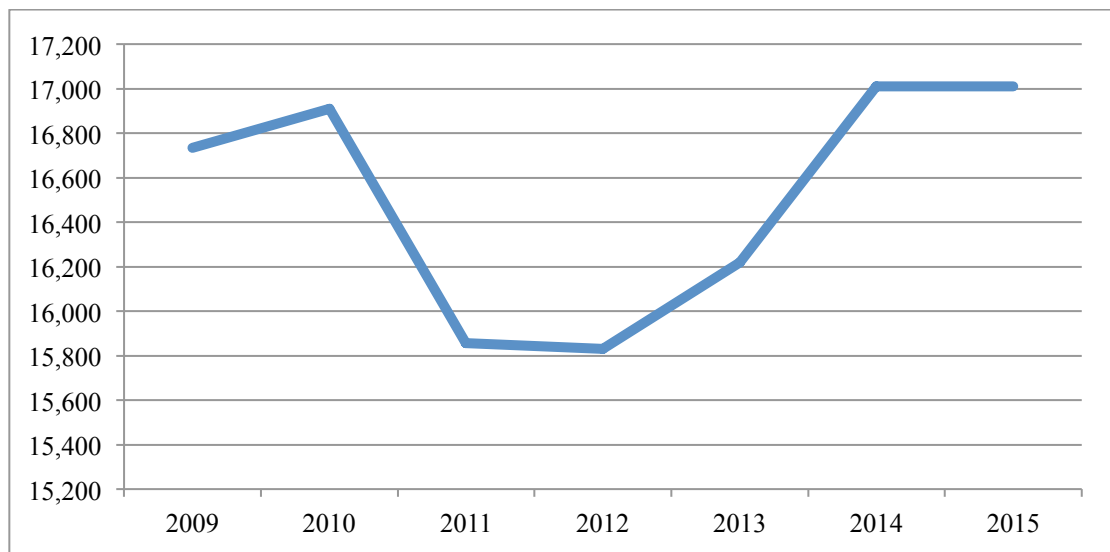
Second, in examining trends over time, a significant change in the methodology for the BRES was made recently. From January 2016, the coverage of the ONS Standard Business Survey Population was extended to include a population of solely Pay As You Earn (PAYE)-based businesses. Nationally, this improvement in coverage is

² 2011 Census.

estimated to have increased the business survey population by around 100,000 businesses, with a total of around 300,000 employment and 200,000 employees between December 2015 and January 2016. The increase in business population has led to an increase in the estimate of the number of employment and employees. For this reason, we analyse trend growth based on the period 2009 to 2015 (since there is discontinuity in the method with the 2016 data).

BRES data for the period 2009-2015 indicates that total employment levels in Richmondshire were only slightly higher in 2015 than their 2009 level; growing by around 1.6% (+275 jobs). There was considerable variation over the period however, with a contraction in employment taking place 2009 to 2012 (reflecting the Late 2000s Recession) and a recovery from 2012 to 2015.

Figure 3.2: Total employment 2009-2015, Richmondshire



Source: BRES data.

Examination of BRES data by industrial sector for the 2009-2015 period shows wide variation in performance across industrial sectors. Three sectors experienced an absolute expansion in employment of 250 or more jobs:

- Accommodation & food services (+625 jobs, +26%);
- Professional, scientific & technical (+425 jobs, +61%); and
- Retail (+250 jobs, +14%).

Three sectors experienced an absolute contraction in employment of 250 or more jobs:

- Public administration & defence (-275 jobs, -24%);
- Wholesale (-250 jobs, -26%); and
- Health (-250 jobs, -14%).

In terms of total employment in 2015, the retail and accommodation & food services sectors accounted for the largest proportion of employment. Together these two sectors accounted for around 29% of total employment.

Figure 3.3: Employment by broad industrial sector 2009-2015, Richmondshire

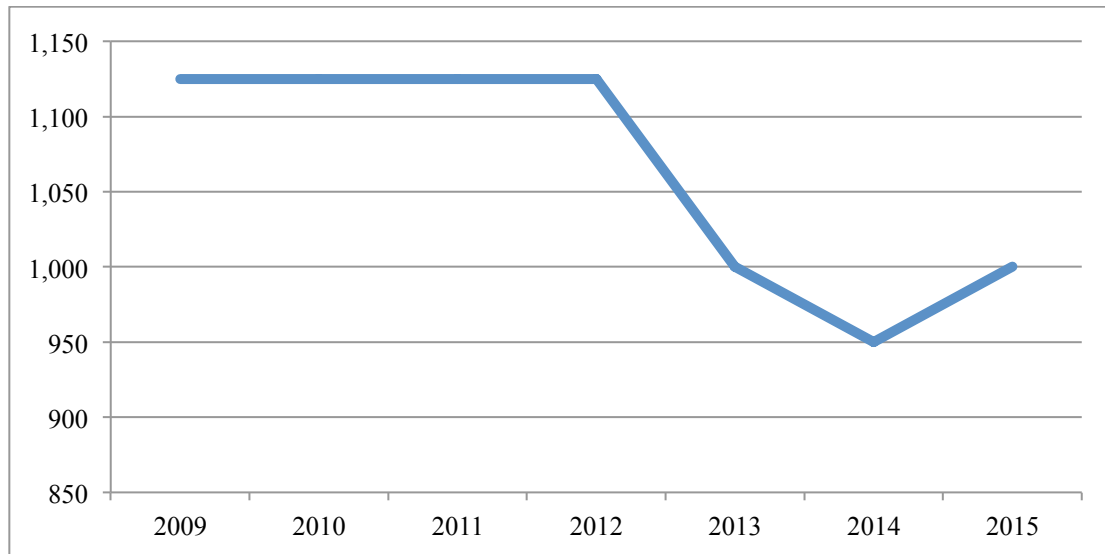
Industrial Sector	Employment		Change 2009-2015	
	2009	2015	No.	%
Agriculture, forestry & fishing	60	100	40	66.7%
Mining, quarrying & utilities	230	220	-10	-4.3%
Manufacturing	1,125	1,000	-125	-11.1%
Construction	1,125	1,000	-125	-11.1%
Motor trades	400	375	-25	-6.3%
Wholesale	950	700	-250	-26.3%
Retail	1,750	2,000	250	14.3%
Transport & storage	550	600	50	9.1%
Accommodation & food services	2,375	3,000	625	26.3%
Information & communication	200	150	-50	-25.0%
Financial & insurance	120	140	20	16.7%
Property	400	375	-25	-6.3%
Professional, scientific & technical	700	1,125	425	60.7%
Business administration & support services	1,250	1,125	-125	-10.0%
Public administration & defence	1,125	850	-275	-24.4%
Education	1,375	1,500	125	9.1%
Health	1,750	1,500	-250	-14.3%
Arts, entertainment, recreation & other services	1,250	1,250	0	0.0%
Total	16,735	17,010	500	3.0%

Source: BRES data.

Note: Employment in 'Public administration & defence' excludes MOD/Armed Forces employment at Catterick Garrison.

It is also useful to consider trends in manufacturing employment in the context of long-term structural change in the economy. Over the period 2009-2015, total employment in the manufacturing sector contracted by 275 jobs (11%). Within the period however, a sharp contraction in 2012 to 2014 was followed by an expansion in employment of around 5% in 2014 to 2015.

Figure 3.4: Total employment in manufacturing 2009-2015, Richmondshire



Source: BRES data.

The Annual Population Survey (APS)³ provides an alternative source of trend data on employment. The APS has the advantage of offering consistent trend data over a longer period than is possible with ABI/BRES data⁴ and includes more recent data to 2017. The APS data also includes the self-employed, providing a fuller picture.

It should be noted however that the methodology for collection of workplace data for the APS relies on by proxy responses from households. The data on workplaces may be less accurate than that collected from business surveys. In addition, members of the armed forces are only included if they live in private accommodation.

Workplace analysis data from the APS for the period 2004 to 2017 shows total growth in employment (aged 16-64) of 5,000 jobs, an increase of 23.8%⁵. As illustrated in Figure 3.5, Richmondshire experienced considerable variation in employment over this period. Broadly, there was a period of expansion in 2004 to 2009 followed by a sharp contraction in 2009 to 2011 and an expansion thereafter. This reflects trends in the wider UK macroeconomy.

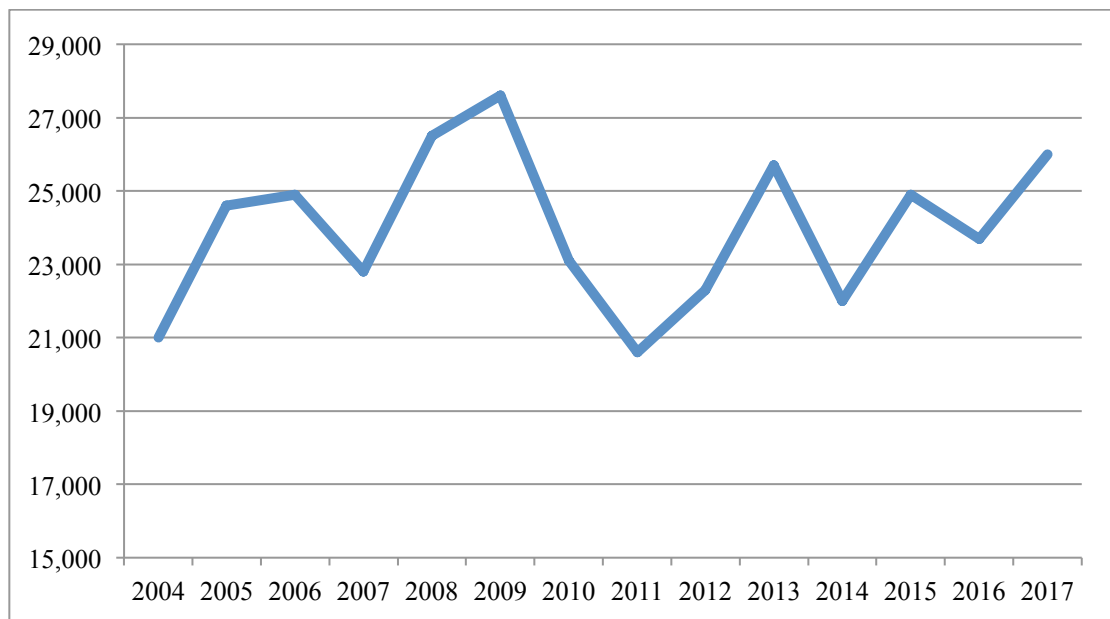
In the most recent period of expansion (2011 to 2017), employment has grown by the order of 5,400 jobs, an increase of 26.2%. Notably there has been significant growth in the most recent years 2015-2017 that is yet to be fully reflected in the BRES data (which only runs to 2015 on a consistent methodological basis).

³ Formerly the Labour Force Survey (LFS).

⁴ There is a discontinuity in ABI/BRES data in 2008/09 that means that the figures are only consistent from 2009.

⁵ Based on persons aged 16-64 in employment, APS workplace analysis data. Periods Jan04Dec04 – Jan17Dec17.

Figure 3.5: People aged 16-64 in Employment, 2004-2017, Richmondshire



Source: ONS Annual Population Survey (APS).

Travel to work patterns

Origin-destination data published by the Office for National Statistics (ONS) provides data on the travel to work patterns of individuals⁶. This can be used to understand patterns across different areas of the District.

Figure 3.6 shows the top ten residence origins of workers in Richmondshire by local authority. This indicates that around 64.5% of workers in Richmondshire also reside in the District. Local authorities in the Tees Valley (and in particular, Darlington) are well represented in the top ten local authorities by worker origin.

Figure 3.6: Top 10 residence origins of workers in Richmondshire

	Residence origin: Local authority	% of workers in Richmondshire
1	Richmondshire	64.5%
2	Darlington	6.0%
3	Hambleton	4.0%
4	County Durham	3.6%
5	Harrogate	1.9%
6	Stockton-on-Tees	1.1%
7	Middlesbrough	0.5%
8	Redcar and Cleveland	0.5%
9	Leeds	0.4%
10	Ryedale	0.4%

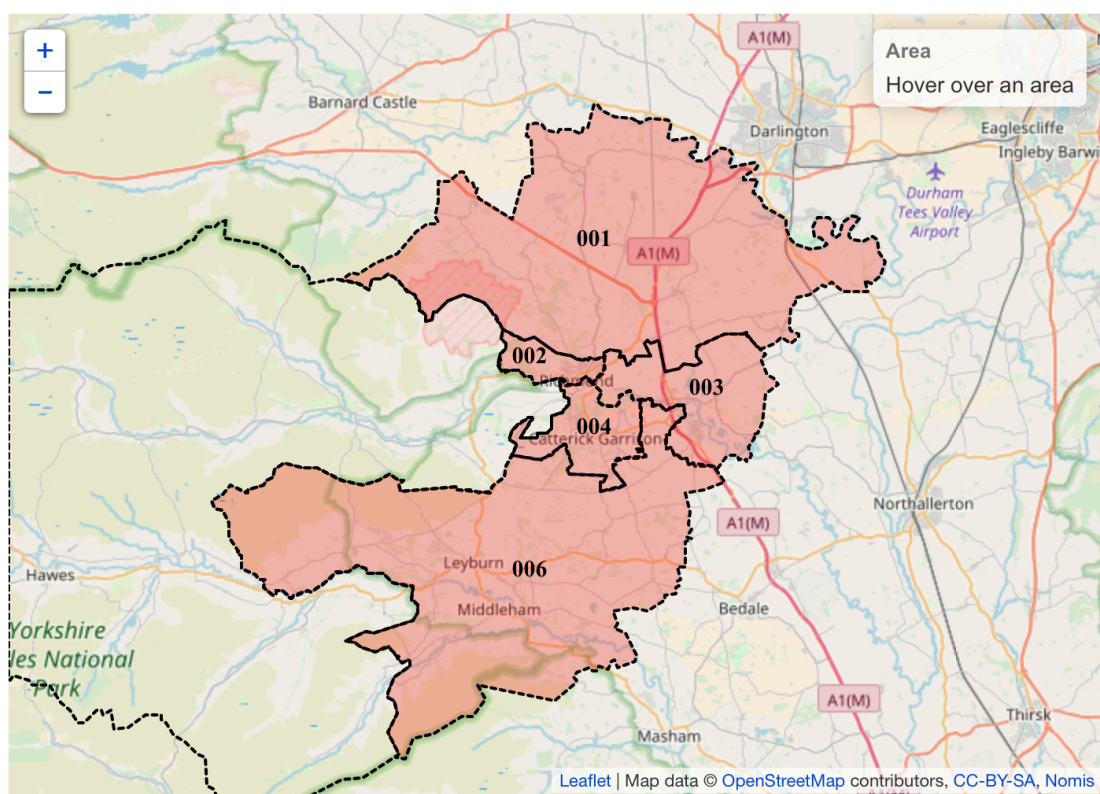
Source: ONS.

⁶ 2011 Census.

Using Middle Layer Super Output Areas (MSOAs)⁷, patterns in the areas around main settlements in the District can be identified. It is noted that these MSOAs cover broader areas than the settlements only. Figures 3.7 and 3.8 show the MSOAs in Richmondshire and levels of self-containment (at the District level). This shows that there is considerable variation across Richmondshire.

In particular, the MSOAs containing Leyburn, Richmond, Catterick Garrison and Colburn show higher levels of self-containment at the District level. The order of 73.2% of workers in MSOA006 (Leyburn) are Richmondshire residents, 70.5% in MSOA002 (Richmond) and 66.3% in MSOA004 (Catterick Garrison and Colburn). In contrast, MSOA001 in the north of the District including Scotch Corner has a lower level of self-containment with only 47.0% of workers residing in the District.

Figure 3.7: MSOAs in Richmondshire



Source: ONS.

Figure 3.8: Self-containment at the District level by MSOA

MSOA	Areas	% workers resident in Richmondshire
001	Scotch Corner	47.0%
002	Richmond	70.5%
003	Brompton on Swale and Catterick Village	61.9%
004	Catterick Garrison and Colburn	66.3%
006	Leyburn	73.2%

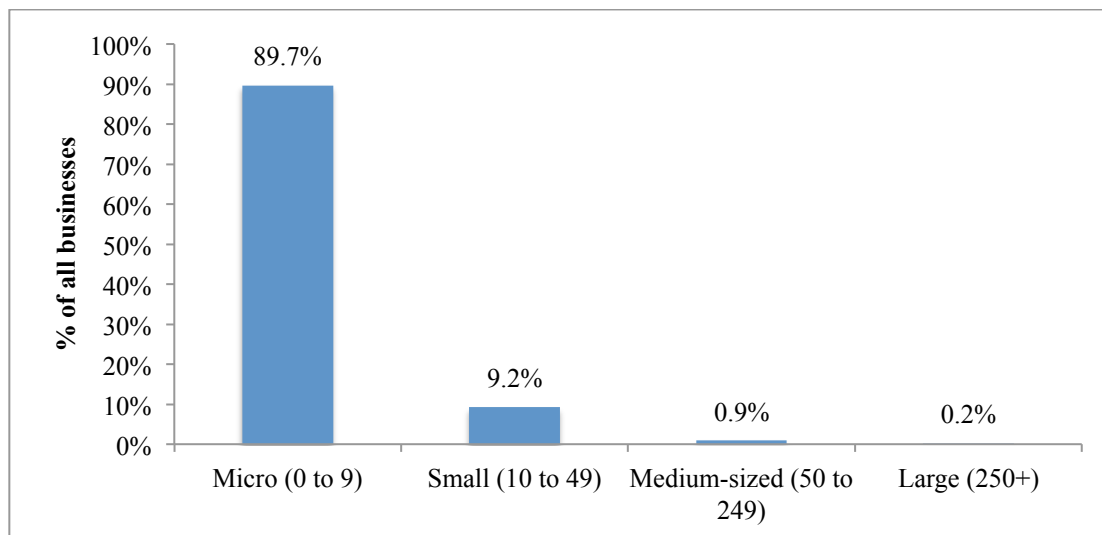
Source: ONS.

⁷ MSOAs are a geographical unit adopted by the ONS.

Business profile

UK business count data from the ONS provides a picture of the size distribution of businesses in Richmondshire in terms of number of employees. As illustrated in Figure 3.9, the majority of businesses in the District (89.7%) are micro businesses with less than 10 employees.

Figure 3.9: Businesses by size (number of employees), 2017, Richmondshire



Source: ONS UK Business Counts, based on IDBR (2017).

Comparing Richmondshire with other areas, the District has a slightly higher proportion of micro businesses than the YNYER LEP area, Yorkshire and Humber region and nationally. It also has a smaller proportion of medium to large businesses (1.1%) than the YNYER LEP area (1.6%), Yorkshire (2.1%) and Humber region and nationally (1.9%).

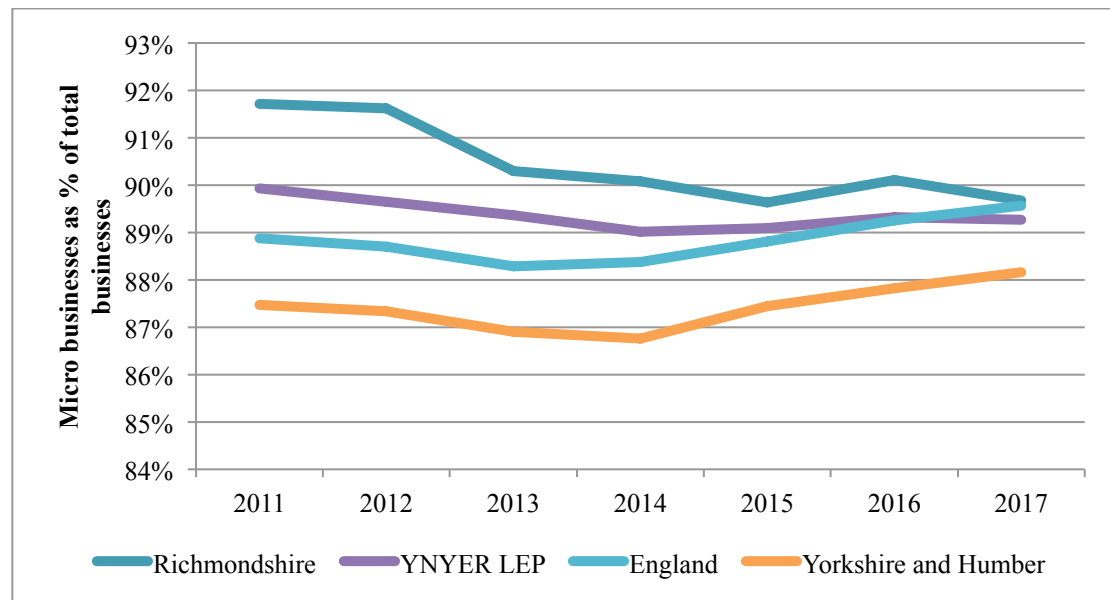
Figure 3.10: Businesses by size (number of employees), 2017

Area	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)
Craven	90.1%	8.4%	1.2%	0.1%
East Riding of Yorkshire	89.2%	9.3%	1.2%	0.2%
Hambleton	90.0%	8.8%	1.1%	0.2%
Harrogate	90.1%	8.0%	1.5%	0.4%
Richmondshire	89.7%	9.2%	0.9%	0.2%
Ryedale	89.9%	9.0%	0.8%	0.3%
Scarborough	86.8%	12.0%	0.8%	0.2%
Selby	91.0%	7.7%	1.1%	0.3%
York	87.4%	10.1%	2.0%	0.4%
YNYER LEP	89.3%	9.2%	1.3%	0.3%
England	89.6%	8.5%	1.5%	0.4%
Yorkshire and Humber	88.2%	9.7%	1.7%	0.4%

Source: ONS UK Business Counts, based on IDBR (2017).

Examining trends over time, the proportion of businesses in Richmondshire that are micro businesses has fallen over the period 2011-2017 (from 91.1% to 89.7%). Notably, this contrasts with increases that were experienced in the Yorkshire and Humber region and nationally. The fall was also greater than the fall experienced in the YNYER LEP area. This could reflect growth in indigenous businesses in the District or greater numbers of larger firms moving in from outside.

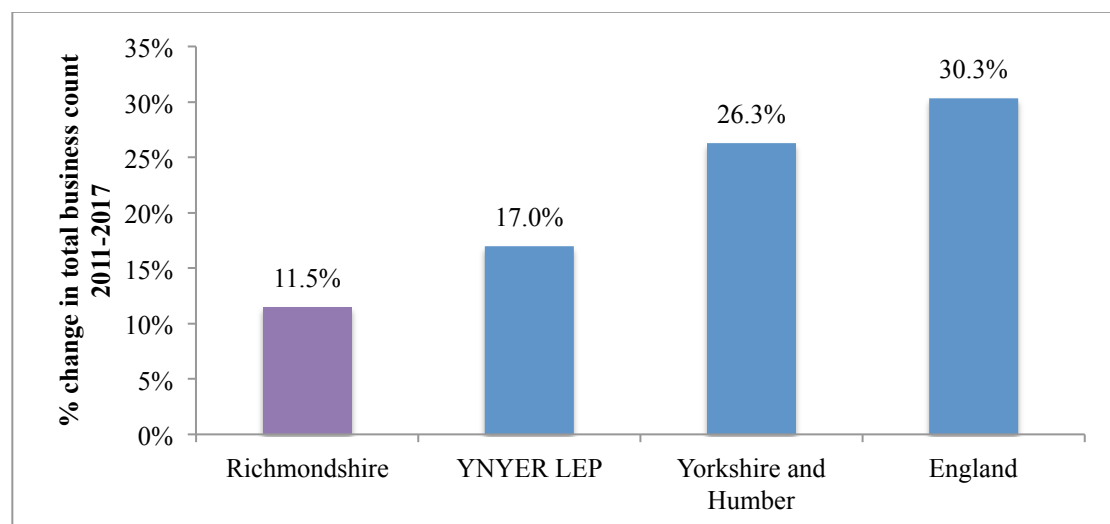
Figure 3.11: Micro businesses as % of total businesses, 2011-2017



Source: ONS UK Business Counts, based on IDBR (2017).

Over the period 2011 to 2017, the total business count in Richmondshire increased by 11.5%. This is a lower rate of growth than recorded in the YNYER LEP area (17.0%), Yorkshire and Humber region (26.3%) and nationally (30.3%).

Figure 3.12: Change in total business count, 2011-2017



Source: ONS UK Business Counts, based on IDBR (2017).

Business demography data published by the ONS provides a picture of new business births and survival rates. This shows that new business births in Richmondshire grew by 18.9% in 2010 to 2016, a significantly lower rate than in North Yorkshire, the Yorkshire and Humber region and nationally.

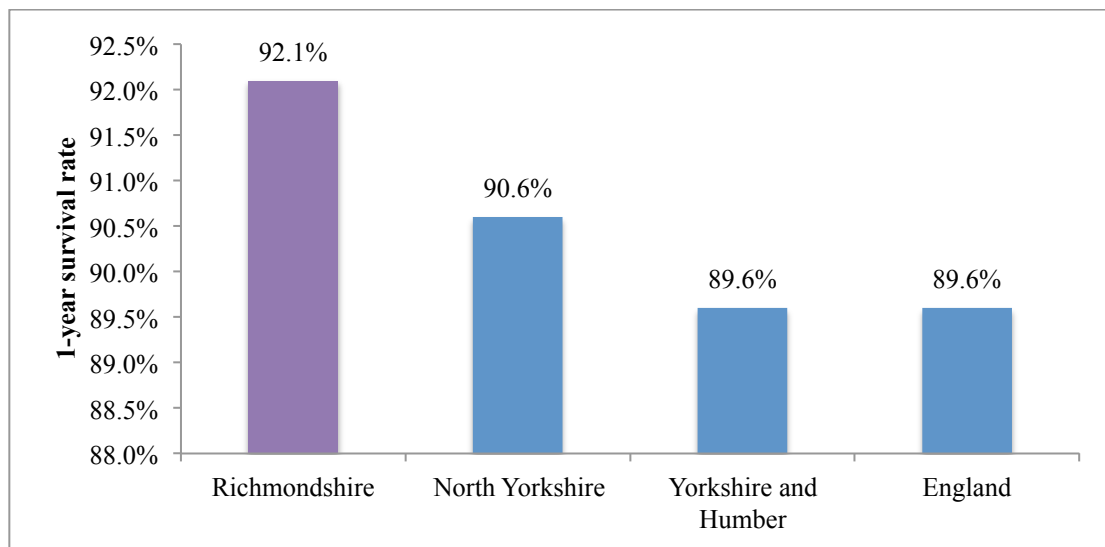
Figure 3.13: Change in business births, 2010-2016

Area	2010	2016	Change 2010-2016	
			No.	%
Richmondshire	185	220	35	18.9%
North Yorkshire County	2,295	3,095	800	34.9%
Yorkshire and Humber	16,630	27,220	10,590	63.7%
England	207,520	374,035	166,515	80.2%

Source: ONS Business Demography data.

Richmondshire outperforms these other areas however in terms of business 1-year survival rates. The latest data, relating to the birth of enterprises in 2015, shows that Richmondshire has a 1-year survival rate of 92.1%, substantially above that in North Yorkshire, the Yorkshire and Humber region and nationally.

Figure 3.14: Business survival rates at 1-year, 2015 births



Source: ONS Business Demography data.

3.4 Key future economic drivers

There are three important future economic drivers of economic growth in Richmondshire that are pertinent at the time of this ELR:

1. Completion of the A1 upgrade;
2. Expansion of Catterick Garrison; and
3. Development of a Designer Retail Outlet at Scotch Corner.

It is also important to note changes in both the shape and progress of the first two of these drivers since the 2012 ELR Update was undertaken.

An overview of each driver and how it is considered in the ELR is provided below.

Expansion of Catterick Garrison

The MOD has announced a new vision for growth of its presence at Catterick Garrison. This projection differs from that envisaged at the time of the 2012 ELR Update.

Currently, there are the order of 12,000 military service personnel and dependents based in Catterick Garrison (comprising of 7,000 personnel and 5,000 dependants). Further to this, there are around 3,000 transient through the facility annually⁸.

The MOD is projecting that an additional 4,900 military service personnel and dependents will be based in Catterick Garrison (comprising of 2,700 personnel and 2,200 dependants) in the plan period to 2035⁹. It is anticipated that these additional military service personnel will arrive in two tranches; with around 1,350 in 2019-2023 and the remaining 1,350 in 2027-2031. It has not yet been confirmed how many dependents will accompany each of the two tranches of personnel, but it is estimated to be around 1,100 dependants in each tranche.

In terms of the approach applied in considering the impacts of this expansion in this ELR, the following is noted:

- 1. Impact on future employment land requirements** – The ELR treats military related growth as separate to the employment growth scenarios in Section 6. This is based on assumption that additional military personnel will be accommodated on the MOD's existing estate and that any increase in the size of Catterick Garrison is unlikely to drive direct B-class employment growth locally because of the nature of MOD procurement. This has been informed by discussions with the MOD and research evidence on the economic impacts of MOD procurement produced by SQW¹⁰. This approach is in line with that adopted in the 2012 ELR Update.

It is noted however that the impact of growth of Catterick Garrison is expected to play a role in improving investor confidence in the Catterick Garrison/Colburn area (as identified in the property analysis in Section 4);

- 2. Impact on supply of employment land** – The MOD owns a number of sites in Catterick Garrison that are likely to be surplus to its operational requirements in the future. The planned expansion of military personnel numbers and dependents provides an opportunity for these sites to be redeveloped for alternative uses supporting this growth. The MOD has made submissions setting out its intentions as part of the 2017 Call for Sites and discussions held as part of the development of the ELR. This is considered as part of the sites assessment in Section 5.

Completion of A1 upgrade

Since the 2012 ELR Update, the A1 upgrade project was reinstated and is now nearing completion.

The A1 upgrade is making the District more accessible to wider markets.

⁸ Estimates provided by MOD (March 2018).

⁹ Estimates provided by MOD (March 2018).

¹⁰ 'The Economic Impact of Military Presence in North Yorkshire', SQW (February 2010).

Businesses need to be able to move goods, people, and information quickly, easily and reliably if they are to be able to realise their growth potential. Transport networks that are well maintained and have minimal congestion enable businesses to become more competitive and reduce transport costs by moving both people and goods reliably and quickly. The completion of the A1 upgrade is therefore expected to have a positive impact on economic growth in Richmondshire.

The full impacts of the A1 upgrade are expected to take a number of years to be fully realised. The potential effects on the property market in Richmondshire are considered in Section 4. The implications for employment growth are considered in Section 6.

Designer Outlet Development at Scotch Corner

Full planning permission has been granted for a Designer Retail Outlet at Scotch Corner. The project will provide the order of 250,000 sq ft of retail space, involving an investment of approximately £50 million.

The project promoter has indicated that construction will start imminently with the development expected to open in late 2019/early 2020.

The Designer Retail Outlet represents phase 1 of development by the project promoter. They also hold further land at Scotch Corner that they expect to develop in the future with other uses compatible with the Designer Retail Outlet.

It is estimated the Designer Outlet will support over 700 gross direct jobs once fully occupied. It should be noted that these jobs are not included in the REM forecasts that provide the basis for the employment growth scenarios in this ELR.

3.5 Functional Economic Market Area

Planning Practice Guidance (PPG) states that economic development needs should be assessed in relation to relevant Functional Economic Market Areas (FEMAs). This refers to the spatial level at which local economies and markets actually operate.

Since patterns of economic activity vary from place to place, there is no standard approach to defining a FEMA. The following factors can be taken into account according to the PPG however:

- The extent of any Local Enterprise Partnership within the area;
- Travel to work areas;
- Housing market area;
- Flow of goods, services and information within the local economy;
- Service market for consumers;
- Administrative area;
- Catchment areas of facilities providing cultural and social well-being; and
- Transport network.

In doing so, it is important to consider what is appropriate in the local context. In addition, not all of the key indicators are readily available and there is no appropriate source of data. For example, the flow of goods and services is particularly difficult to quantify on a robust basis.

For the purposes of the ELR, we have drawn upon the existing evidence, extent of the LEP area, administrative geographies, the transport network, service network and the DTC Workshop session.

Key administrative areas relevant to Richmondshire are:

- Darlington Borough Council;
- Durham County Council;
- Hambleton District Council;
- Harrogate Borough Council;
- North Yorkshire County Council;
- Yorkshire Dales National Park Authority; and
- York, North Yorkshire and East Riding LEP.

It is clear that whilst the local authority boundary provides a good guide to the FEMA for Richmondshire, there exists an overlap with other functional geographies in the peripheral areas of the District. For example, the northerly parts of the District have strong links with the Tees Valley City Region. It is noted that the existence of some overlap is accepted in the PPG however.

Overall, it would seem appropriate for the ELR to focus on assessing the specific employment land needs of Richmondshire District.

Summary

- Richmondshire is predominantly rural in character and the western part of the District is situated within the Yorkshire Dales National Park (YDNP);
- Key road connections include the A1 that runs north-south thorough the eastern part of the District providing access to Tees Valley and the A684 that runs east-west through the Yorkshire Dales National Park;
- Richmond is the historic administrative and service centre of the District but its historic environment limits future opportunities for physical expansion;
- Catterick Garrison is the largest British Army Garrison. Colburn is located close to Catterick Garrison Town. Both are less constrained than Richmond in terms of future expansion potential;
- Leyburn is a market town in Wensleydale and its economy has diversified over recent years to compensate for the decline in local quarrying employment;
- BRES data indicates that total employment levels in Richmondshire were only slightly higher in 2015 than their 2009 levels, growing by around 1.6% (+275 jobs). There was considerable variation over the period however and a recovery is evident in 2012 to 2015;
- BRES data indicates that different sectors of the economy exhibited a wide variation in performance in the 2009-2015. Three sectors experienced an absolute expansion in employment of 250 or more jobs:
 - Accommodation & food services (+625 jobs, +26%);

- Professional, scientific & technical (+425 jobs, +61%); and
- Retail (+250 jobs, +14%).

The retail and accommodation & food services sectors accounted for the largest proportion of total employment in 2015 - together accounting for around 29% of total employment;

- BRES data shows that the manufacturing sector in Richmondshire contracted by 275 jobs (11%) over the period 2009-2015. Within the period however, a sharp contraction in 2012 to 2014 was followed by an expansion of around 5% in 2014 to 2015;
- The Annual Population Survey (APS)¹¹ provides an alternative source of trend data on employment and includes the self-employed. This shows total growth in employment in Richmondshire in 2004 to 2017 of 5,000 jobs, an increase of 23.8%;
- In the most recent period of expansion (2011 to 2017) employment has grown by in order of 5,400 jobs, an increase of 26.2%. Notably there has been significant growth in the most recent years 2015-2017 that is yet to be fully reflected in the BRES data;
- Leyburn (73.2%), Richmond (70.5%), Catterick Garrison and Colburn (66.3%) show higher levels of self-containment at the District level than other areas. Scotch Corner has a lower level of self-containment with only 47.0% of workers residing in the District;
- The majority of businesses in the District (89.7%) are micro businesses with less than 10 employees;
- Richmondshire has a smaller proportion of medium to large businesses (1.1%) than the YNYER LEP area, Yorkshire and Humber region and nationally;
- The proportion of businesses in Richmondshire that are micro businesses has fallen over the period 2011-2017 (from 91.1% to 89.7%). This could reflect growth in indigenous businesses in the District or greater numbers of larger firms moving in from outside;
- New business births in Richmondshire grew by 18.9% in 2010 to 2016, a significantly lower rate than in North Yorkshire, the Yorkshire and Humber region and nationally. Richmondshire substantially outperforms these other areas however in terms of business 1-year survival rates;
- There are three important future economic drivers of economic growth in Richmondshire that are pertinent at the time of this ELR:
 1. Completion of the A1 upgrade;
 2. Expansion of Catterick Garrison; and
 3. Development of a Designer Retail Outlet at Scotch Corner.
- The MOD is projecting that an additional 4,900 military service personnel and dependents will be based in Catterick Garrison (comprising of 2,700 personnel and 2,200 dependants) in the plan period to 2035;

¹¹ Formerly the Labour Force Survey (LFS).

- The A1 upgrade is nearing completion and is making the District more accessible to wider markets, supporting greater economic growth going forward;
- It is expected that a Designer Retail Outlet at Scotch Corner will open in late 2019/early 2020;
- The local authority boundary provides a good guide to the FEMA for Richmondshire, acknowledging that there exists an overlap with other functional geographies in the peripheral areas of the District. Overall, it would seem appropriate for the ELR to focus on assessing the specific employment land needs of Richmondshire District.

4 Property Market Context

4.1 Overview

This section provides a summary of the property market context in Richmondshire. The analysis includes consideration of the current supply of premises and recent activity in the market. The purpose is to provide an understanding of the recent and current dynamics of the commercial property market.

The analysis draws on the significant activity of the Economic Development Department of the Council as well as data from local estate agents.

4.2 Importance of the A1 Corridor

The A1 corridor is a focus for strategic investment by the LEP and RDC. The A1 upgrade is supporting further investment and economic activity along the corridor.

The A1/A19 Corridor is identified in the LEP's Strategic Economic Plan as being the economic spine of the LEP area. The A1 and A19 connect the LEP area with Middlesbrough, Darlington and Tyneside to the north and the Leeds City and Sheffield City Regions to the south. The corridor takes in towns including Northallerton, Ripon, Richmond, Thirsk and Boroughbridge, as well as the City of York.

Economically, the area is important to businesses that require rapid access to the trunk road and rail networks. Examples in the LEP area include two food based business parks at Leeming Bar and Melmerby.

The creation of a town centre at Catterick Garrison, one of the largest armed forces base in Europe, is identified in the SEP as offering sizeable benefits.

The A1/A19 Corridor is identified as one of the most attractive bases for new development because of its transport connections, including the East Coast Mainline Rail, and because of its predominantly flat terrain.

It is expected that the full economic benefits of improvements along the A1 Corridor will take a number of years to fully manifest. There is anecdotal evidence however that some impact is already being seen in terms of investor confidence and activity in the commercial property market. Locations that offer similar levels of access to A1 as Colburn in Richmondshire are seeing increased interest as they are cheaper than sites directly on A1 but provide fairly good access.

Strategic recent or planned investments include a number of locations along the corridor in the LEP area. This includes logistics activity at Melmerby and Sherburn and a high technology business park in Harrogate.

4.3 Sub areas

The commercial property market in Richmondshire can be considered in terms of the following sub-areas:

- Richmond
- Catterick Garrison and Colburn
- Brompton on Swale

- Leyburn
- Scotch Corner
- Other areas

Richmond

Richmond is an important location for the District and provides an established office and industrial market offer.

The historic characteristics of the area mean that there are physical constraints in terms of both the existing offer and potential for provision of new employment premises. Broadly, Richmond fulfils an established role in providing for the business premises needs of smaller, higher value businesses in the town centre and larger businesses of a more diverse nature nearby on the Gallowfields Trading Estate.

Office market

Town Centre

As the key settlement and administrative centre for the District, Richmond has a well-established market for office premises. It is the location of Richmondshire District Council's offices, situated at Mercury House on Station Road.

The Mercury House office complex was opened in late 2013, enabling all of Richmondshire District Council's services to be housed in one building. The Council's old offices in Swale House, Frenchgate and Friars Wynd and the community office in Dundas Street closed and services transferred to the new building. The last of the Council's former office premises was sold in 2015 (Swale House) to a developer for residential conversion. The properties at Frenchgate House and Friars Wynd were also converted to residential uses.

Richmond is physically constrained. Consequently, both the scale and quality of office premises available for businesses is limited. Available stock is typically of low quality and located above retail units. Turnover in the market is relatively slow.

There are currently two offices available at Newbiggin.

Gallowfields Trading Estate

The Gallowfields Trading Estate provides a mix of office and industrial premises.

Mowbray House/Jackson Court on Olympic Way provides a mix of separate office suites and industrial units available to rent. Two of the eight office units, which are all approximately 56 sqm (600 sq ft), are currently available.

Figure 4.1: Available office premises, Richmond

Property	Description	Size	
		sqm	Sq ft
Office 6 Mowbray House, Gallowfields Trading Estate	Office space with reception and on-site parking	56	600
Office 7 Mowbray House, Gallowfields Trading Estate	Office space with reception and on-site parking	56	600
10 Newbiggin, Richmond	Two offices to let	10 - 14	103-152

Industrial market

Gallowfields Trading Estate

The Gallowfields Trading Estate, located the north west of the town centre, is the main industrial estate in Richmond. Current occupiers of industrial premises include a mix of manufacturing businesses and those with a customer facing trade counter.

There are several parts of the Gallowfields Trading Estate.

Jackson Court on Olympic Way comprises of 5 units of 185 sqm (1,990 sq ft).

The Greenbelt Holdings section located on Borough Road was refurbished in 1999 and comprises 18 units in total with units ranging in size from 19 sqm (207 sq ft) to 192 sqm (2,070 sq ft). These units have been relatively popular over the years. The demand for the smaller units is typically the strongest. The larger, more expensive, units take slightly longer to let.

Racecourse Court comprises five units ranging in size from 46 sqm (500 sq ft) to 93 sqm (1,000 sq ft). Demand for these units is stable.

In addition, there are 12 units on Racecourse Road ranging in size from 31 sqm (330 sq ft) to 123 sqm (1,320 sq ft). It is understood that demand is relatively strong for these units.

Overall, Gallowfields Trading Estate serves an established local market of businesses seeking to be located in Richmond. Whilst activity at the estate is healthy, there is not a strong rationale for large-scale development or redevelopment.

Figure 4.2 shows industrial premises available in Richmond.

Figure 4.2: Available industrial premises, Richmond

Property	Description	Size	
		sqm	Sq ft
Containers, Firby Buildings, Borough Road, Gallowfields Trading Estate	Containers available for storage	n/a	n/a
Firby Court, Gallowfields Trading Estate	Two industrial units	42	450
2a and 2b Mercury Way, Gallowfields Trading Estate	Warehouse/industrial units	116	1,244
6 Borough Road, Gallowfields Trading Estate	Industrial unit with office, retail area and road side frontage	121	1,302
4 Borough Road, Gallowfields Trading Estate	Detached light industrial unit in secure compound	180	1,940
Green Howards Road, Gallowfields Trading Estate	Industrial premises with yard for sale	408	4,394

Catterick Garrison/Colburn

Catterick Garrison/Colburn is also an important location for the District and provides an established office and industrial market offer. It does not have the physical constraints that Richmond has and offers good access to the A1.

An important investment has been made in the A6136, providing a package of road junction improvements to improve traffic flow between the A1, Colburn and Catterick Garrison town centre. The aim of this investment was to secure both housing and employment growth opportunities.

Significant property investment and development activity has taken place in the area in recent years. A 150,000 sq ft retail and leisure park development in Catterick Garrison, known as Princes Gate, opened in 2015. The scheme comprises modern retail units, a seven-screen Empire cinema, cafés, restaurants and bars and a 60-bed Premier Inn. This scheme has enhanced the retail and leisure opportunities in the area.

Looking forward, there are three potential catalysts for future employment growth in the Catterick Garrison/Colburn area:

1. Completion of the A1 upgrade;
2. Expansion of personnel numbers at Catterick Garrison; and
3. Increase in population due to concentrated housing growth.

The completion of the A1 upgrade is expected to contribute toward increased investor confidence in the market for employment premises along the A1 corridor. This is expected to improve demand for employment land. In particular, Colburn Business Park has a unique locational advantage and an established history of successful employment activity to capitalise on the improved market conditions.

The future expected expansion of personnel numbers at Catterick Garrison is also anticipated to generate a positive impact on the property market in the Colburn/Catterick Garrison area.

The increase in population due to concentrated housing growth will increase the available workforce and custom.

The timing of these three catalysts is such that the full beneficial economic and market impacts are expected to occur over coming months and years.

Office market

Colburn Business Park

Colburn Business Park is one of the primary employment sites in Richmondshire. Its offer comprises of a mix of office buildings and light industrial units.

The office offer was developed in Phase 1 of the business park in the late 2000s. The office premises on the site take the form of buildings in a business park type setting. The units range in size from 209 sqm (2,250 sq ft) to 936 sqm (10,070 sq ft).

The business park is also the location of the Innovate Centre that provides 16 managed office units targeted at small and medium enterprises. The units offered range in size from 19 to 73 sqm (200 to 780 sq ft) and are provided on the basis of all-inclusive rents.

Significant public sector infrastructure investment has been made to support the development of Colburn Business Park. This contributes not only to enabling the delivery of the current buildings and economic activity but also in enabling a development platform for the remaining undeveloped parts of the site.

There are few other comparable sites for employment in the Colburn/Catterick Garrison area. Furthermore, Colburn Business Park is distinct in its offer of business park-type office space suitable for the professional services sector with good access to the A1 and facilities at Catterick Garrison. The business park offers a number of locational advantages. The completion of the A1 upgrade and future planned investment in the retail offer in Catterick Garrison will contribute further to the site's attractiveness in the future.

Overall available premises

Figure 4.3 shows office premises available in Catterick Garrison/Colburn. This comprises of a range of units in Bailey Court and serviced offices at Innovate, all on Colburn Business Park.

Figure 4.3: Available office premises, Catterick Garrison/Colburn

Property	Description	Size	
		sqm	Sq ft
Innovate, Colburn Business Park, Catterick	Serviced offices to let	19 - 73	200 - 780
Offices, Bailey Court, Colburn Business Park	Office space with parking	96 - 460	1,035 - 4,951
Offices, Bailey Court, Colburn Business Park	Office space with parking	209	2,250
Offices, Bailey Court, Colburn Business Park	Office space with parking	93 – 207	999 - 2,229
Offices, Bailey Court, Colburn Business Park	Office space with parking with opportunity to sub-divide	304 - 936	3,270 - 10,070

Industrial market

Colburn Business Park

The industrial offer at Colburn Business Park was delivered in a second phase of development. This provides light industrial units within a business park setting.

There have been two recent planning applications for industrial type employment uses at Colburn Business Park.

The first is a planning application seeking full planning permission for the development of six business units at the northern edge of the business park, abutting the A6136 (Catterick Road). This application was granted at planning committee subject to resolution of highways and drainage issues. The second application relates to land to the west of Colburn Business Park, adjacent to the existing IPS Innovate Business Centre. Planning permission for employment uses (manufacturing, storage, and distribution) was granted in August 2017.

These recent applications are indicative of current market interest in employment uses and represent demonstrable investment activity at Colburn Business Park. There is also evidence of local businesses in this area seeking opportunities to expand or acquire larger premises.

Walkerville Industrial Estate

Walkerville Industrial Estate provides a different market offer to that provided at Colburn Business Park. Levels of demand are reasonably solid in this location.

Overall available premises

Figure 4.4 shows industrial premises available in Catterick Garrison/Colburn. This comprises of a unit at Walkerville and new warehouse units.

Figure 4.4: Available industrial premises, Catterick Garrison/Colburn

Property	Description	Size	
		sqm	Sq ft
New warehouse/trade units, Colburn and Catterick Garrison	Terrace of trade/warehousing comprising of secure yard and office space	186 - 465	2,000-5,000
Unit 1, 4 Walkerville, Catterick Garrison	Industrial unit suitable for warehousing, light industrial, trade counter, office space. Available as whole (10,000 sq ft) or 5,000 sq ft	465 - 929	5,000-10,000

Brompton on Swale

Brompton on Swale provides an established industrial market offer.

The A1 improvements scheme may help to strengthen Brompton on Swale's position as an industrial location although demand is still most likely to be from local and regional businesses. It is hard to predict the balance of this effect and the potential for demand to shift toward Catterick Garrison/Colburn (which also benefits from transport improvements).

Industrial market

Gatherley Road Industrial Estate

Gatherley Road Industrial Estate offers 3 bay storage/warehousing facilities with integrated a 2-storey office suite fronting onto the industrial estate road. It is situated just off the A1.

Demand for this location is more influenced by the proximity to the A1 compared to other locations such as the Gallowfields Trading Estate.

Overall available premises

Figure 4.5 shows industrial premises available in Brompton on Swale. This comprises of premises at Station Road and Gatherley Road Industrial Estate.

Figure 4.5: Available industrial premises, Brompton on Swale

Property	Description	Size	
		sqm	Sq ft
Industrial property, Station Road, Brompton on Swale	Large workshops, mezzanine floor, separate offices situated in own grounds with parking	4,689	439
Gatherley Road Industrial Units, Brompton on Swale	Industrial units to let	123 - 277	1,320 - 2,985

Leyburn

Leyburn provides an established market offer. Broadly, Leyburn is a well performing settlement that serves the needs of its wider rural hinterland.

Office market

Overall available premises

Figure 4.6 shows office premises available in Leyburn.

Figure 4.6: Available office premises, Leyburn

Property	Description	Size	
		sqm	Sq ft
Chapel House, Leyburn	Second floor office in market place	21	225

Industrial market

Leyburn Business Park

Leyburn Business Park provides a mix of stone workshop/industrial units and retail outlets, laid out with good quality landscaping, located in an attractive rural setting. Typical occupants are manufacturing in nature, some with trade counter elements. The Business Park is relatively buoyant.

Overall available premises

Figure 4.7 shows industrial premises available in Leyburn. This comprises of premises at Leyburn Business Park, Kelberdale Court and Harmby Road Business Park.

Figure 4.7: Available industrial premises, Leyburn

Property	Description	Size	
		sqm	Sq ft
Thornton House, Leyburn Business Park	Ground floor commercial/office space	51	549
Unit 2 Kelberdale Court, Leyburn	Office, retail or light industrial use	Not specified	Not specified
Harmby Road Business Park, Leyburn	Five modern light industrial units to let	186 - 279	2,002 - 3,003

Scotch Corner

Scotch Corner provides a distinct offer to that in other parts of the District.

The catchment of Scotch Corner is very different to the Catterick Garrison/Colburn area. Due to its location in the northernmost part of the District, it looks strongly towards Darlington and the wider Tees Valley catchment areas. New development at Scotch Corner in the immediate term is expected to be predominantly retail and leisure uses. The new Designer Outlet, due to be completed in 2019/2020, will be central in driving the development of this role in the future. The role that the forthcoming Designer Outlet may play in stimulating further demand for employment land at Scotch Corner is currently unclear.

The Government has announced that the A66 will be upgraded to dual carriageway along its entire length between Scotch Corner and Penrith but work is not likely to start until after 2020.

In terms of future demand, proximity to the A1 and widened A66 could increase the ability of Scotch Corner to attract B8/Distribution uses in the future. There could be potential for strategically significant, regional-scale B8 uses. It is noted however that there is substantial floorspace coming forward in the Tees Valley and that there are many other locations that are already well established in this market.

Industrial market

Overall available premises

Figure 4.8 shows industrial premises available in the Scotch Corner area.

Figure 4.8: Available industrial premises, Scotch Corner

Property	Description	Size	
		sqm	Sq ft
Unit 3, Eastside, Scotch Corner	Mid-terraced industrial/workshop unit. Ground floor offices and storage	349	3,761

Other areas

There are also further opportunities for businesses outside of the main areas, including locations such as Aske, Skeeby and Melsonby. These areas provide a range of potential opportunities for rural diversification.

Office market

Figure 4.9 shows office premises available in other areas across the District. This comprises of units at Aske and Melsonby.

In Aske, there are available premises at the Riding School and Aske Stables. In Melsonby, there are office suites available at Harelands Courtyard.

Figure 4.9: Available office premises, Other areas

Property	Description	Size	
		sqm	Sq ft
Riding School, Aske	Ground floor modern self-contained office suite including meeting room, broadband and parking	130	1,400
Office 4d, Aske Stables	Second floor office, high speed broadband	14	150
Office 10b, Aske Stables	Ground floor office, high speed broadband	24	300
Harelands Courtyard, Melsonby	Three individual office suites. Also available as one large suite of 932 sq ft	34 - 51	377 - 555

Industrial market

Figure 4.10 shows industrial premises available in other areas across the District. This comprises of units at Skeeby and Melsonby.

In Skeeby, there are industrial units available. In Melsonby, there are commercial storage units available.

Figure 4.10: Available industrial premises, Other areas

Property	Description	Size	
		sqm	Sq ft
Skeeby, nr Richmond	Two industrial units with CCTV and secure compound	56	600
Commercial units, Moor Park, Melsonby	Two commercial storage units available individually or as one	650	7,000

4.4 Previous employment land delivery

An analysis of Richmondshire’s Annual Monitoring Report (AMR) for the years 2007 to 2017 was undertaken. A summary of the main findings in relation to historic employment land delivery is provided in Figure 4.11.

Figure 4.11: Richmondshire AMRs – analysis of employment land delivery

Monitoring year	Employment land delivered (hectares / floorspace)	Summary
2006 / 2007	No data	<ul style="list-style-type: none"> Take-up of some major employment allocations is noted as “slow”. However, allocations at Colburn, Gatherley Road, Leyburn and Richmond have come forward during this period, with Leyburn being particularly buoyant. Additionally, two separate developers have begun work on the construction of units at Colburn Business Park, providing a range of units. Redevelopment of sites within established industrial/trading estate areas at Richmond, Walkerville (Colburn) and Catterick Bridge/Gatherley Road continues to bring forward additional opportunities. Promotion of employment opportunities through conversion and diversification in more remote locations, continues to prove successful.
2007 / 2008	No data	<ul style="list-style-type: none"> ELR is produced (January 2007) and identifies a need for up to 13.8ha of net additional land. 37% of which should be for B1 Office uses, 29% for B2 Industrial uses and 35% for B8 Warehouse and distribution uses. In addition, the proposed expansion of Catterick Garrison (which is not factored into the employment trends projections) could generate the need for a further 2.3ha to 3.4ha of net additional employment land. According to the Review there are 51.3 ha of gross employment land remaining and available across Richmondshire (including the National Park). 60% of the available land is located in

		<p>Colburn/the Garrison main site but a significant proportion of this land is under pressure for residential development possibly due to the constrained nature of Richmond town.</p> <ul style="list-style-type: none"> • Commercial viability is questionable on several sites at the current time, but major proposals e.g. the potential for growth at Catterick Garrison and the A1 upgrade, have the potential to make them more attractive. The majority of land is available in the medium term. • Constraints are primarily linked to land assembly, land ownership and commercial viability rather than physical constraints to limit development. • The majority of office accommodation provided recently in the Colburn Business Park remains vacant.
2008 / 2009	No data	<ul style="list-style-type: none"> • As above
2009 / 2010	No data	<ul style="list-style-type: none"> • As above
2010 / 2011	No data	<ul style="list-style-type: none"> • Revised employment land forecasts were prepared from the regional REM. • The REM outputs (October 2011), indicated that Richmondshire should target 7.12ha of B1, B2, B8 employment land over the period 2006 – 2026. This does not account for employment land losses. • At that time, it was noted that forecasts were likely to be downgraded due to economic circumstances. • The 51.3 ha of gross employment land remaining and available was also downgraded to show that approximately 29.25 ha remain available (this includes allocations and the significant windfall site at Colburn Pipeworks, and includes sites that have planning permission but have not been developed, 2.9 ha for employment at the Pipeworks site and 7 ha at Scotch Corner). Approximately 20.35 ha of the land remaining is located within the central sub area, of which 11.85 ha is within the Hipswell, Scotton, Colburn area.
2011 / 2012	No data	<ul style="list-style-type: none"> • Employment Land Review was updated (2012). The revised ELR found that development of the allocated sites in the existing local plan had been slower than expected and 25ha of allocated employment land remained undeveloped in the plan area's key employment locations. • The ELR update (2012) re-evaluated the potential of the undeveloped sites to come forward. Although site condition and access to local services remained unchanged, assumptions about military related growth and the A1 upgrade stimulating growth have failed to materialise and looked unlikely in the foreseeable future. • The ELR (2012) anticipated growth of just over 3,000 jobs locally over the plan period. It also found that the pattern of economic growth had changed, both in overall scale and its expected drivers. In addition, 30,000 square metres of employment space is available locally in key employment locations. • The amount of land equivalent to provide this floorspace is estimated at 7 hectares. Taking all of these factors into account the ELR (2012) suggested that there was need for no more than an additional 2 hectares of traditional employment land up to 2026. Currently available land and vacancy in existing stock, therefore, provides more than enough scope and flexibility for the expected growth.

		<ul style="list-style-type: none"> The Local Plan Core Strategy therefore proposes the removal of long standing employment sites considered to have clear alternative uses and that 12 hectares of land for employment development, excluding military related needs be brought forward in the period to 2028 to ensure flexibility for growth.
2012 / 2013	No data	<ul style="list-style-type: none"> Planning application made to develop 272 dwellings on the former pipeworks, Catterick Road, Colburn (phase 1). Subsequently granted permission. The Local Plan Core Strategy makes provision for a further 4 hectares of retail and town centre use development at Catterick Garrison town centre
2013 / 2014	No data	<ul style="list-style-type: none"> Core Strategy adopted, and confirms 12-hectare employment land requirement. Catterick Garrison town centre scheme granted permission for retail (6,824 sqm), food and beverage outlets (3,437 sqm), 60-bed hotel and a 7-screen cinema that is expected to create the equivalent of 700 full time jobs.
2014 / 2015	<p>1,027 square metres (B1a) 218 square metres (B2)</p> <p>478 square metres (A1) 93 square metres (A5) 795 square metres (C1) 750 square metres (D1) 6,640 square metres (Sui Generis / Other)</p>	<ul style="list-style-type: none"> Total employment floorspace delivered was 10,861 square metres. Interestingly, the split of where this was delivered is a roughly even split between being within the settlement hierarchy (5,989 sqm) and outside of the settlement hierarchy (4,872 sqm). It is noted that the employment uses outside of locations in the settlement hierarchy includes the extension of Mainsgill Farm Shop, East Layton and the Black Bull Inn, Moulton. An application for a Designer Outlet Centre and associated restaurants was granted planning permission in January 2015. Secretary of State called in the proposal. Public inquiry was scheduled to be held in May 2016.
2015 / 2016	<p>- 342 square metres (B1a) 475 square metres (B2) 607 square metres (B8)</p> <p>10,510 square metres (A1) 143 square metres (A2) 3,552 square metres (A3 / A4/ A5) 2,131 square metres (C1) 963 square metres (D1) 2,53 square metres (D2)</p>	<ul style="list-style-type: none"> Total employment floorspace delivered was 20,582 square metres. Interestingly, the floorspace was predominantly delivered in the settlement hierarchy (19,585 sqm), with only minimal amounts outside of the settlement hierarchy (997 sqm). The vast majority of the retail, leisure, and hotel floorspace pertains to the completion of the Princes Gate scheme in Catterick Garrison. It is noted that the employment uses outside of locations in the settlement hierarchy includes the extension of the PI Arm offices at Aske, Richmond; an industrial unit at Dalton on Tees and the extension of Jervaulx Abbey Tearooms.
2016 / 2017	<p>552 square metres (B1a) 315 square metres (B2) 739 square metres (B8)</p> <p>261 square metres (A1) 675 square metres (A3 / A4/ A5) 788 square metres (D2) 56 square metres (Sui Generis / Other)</p>	<ul style="list-style-type: none"> Total employment floorspace delivered was 3,386 square metres. Interestingly, the split of where this was delivered is a roughly even split between being within the settlement hierarchy (1,850 sqm) and outside of the settlement hierarchy (1,536 sqm). It is noted that the employment uses outside of locations in the settlement hierarchy includes the extension of Chas Long & Sons premises north of Brompton on Swale and the extension of Mainsgill Farm Shop, East Layton. The application for a Designer Outlet Centre and associated restaurants at Scotch Corner was approved in December 2016.

Source: Using Richmondshire AMR reports.

Whilst data on employment land delivered is only available in the most recent years (2014/15 to 2016/17), AMRs do provide a useful picture of main events in the market. One aspect that is particularly notable is the significant change in the economic outlook over the period, reflected in the different employment forecasts adopted in the two ELRs undertaken in 2007 and 2012.

The three most recent AMRs (covering 2014/15, 2015/16 and 2016/17) provide data on total employment land delivered. These show significant variation year to year with the totals being:

- 2014/15 – 10,861 sqm
- 2015/16 – 20,582 sqm
- 2016/17 – 3,386 sqm

It should be noted that these totals include a broader range of use types than just B-class. In addition, large schemes distort the figures year to year. For example, the delivery of new retail and leisure floorspace at the Princes Gate scheme in Catterick Garrison accounts for a large proportion of the total delivered in 2015/16.

With the exception of 2015/16 – which was the year of major retail and leisure activity in Catterick Garrison – around 55% of the employment land delivered was within the settlement hierarchy:

- 2014/15 – 55% within, 45% outside
- 2015/16 – 95% within, 5% outside
- 2016/17 – 55% within, 45% outside

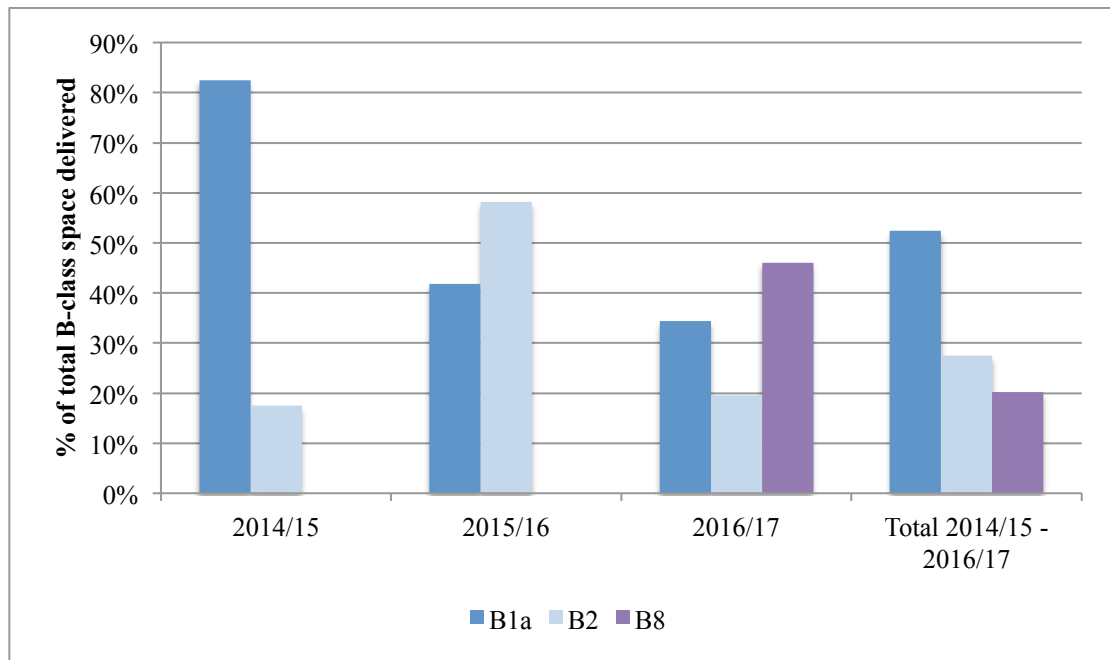
Figures 4.12 and 4.13 provide a summary of the B-class space delivered during the period 2014/15 to 2016/17. This shows that the greatest proportion of total B-class space delivered over the period was B1a (52%).

Figure 4.12: Delivery of B-class employment space, AMRs

Use class	2014/15	2015/16	2016/17	Total 2014/15 - 2016/17
B1a	1,027	342	552	1,921
B2	218	475	315	1,008
B8	-	-	739	739
Total	1,245	817	1,606	3,668

Source: Using Richmondshire AMR reports.

Figure 4.13: Delivery of B-class employment space, AMRs



Source: Using Richmondshire AMR reports.

Summary

- The A1 corridor is a focus for strategic investment by the LEP and RDC. The A1 upgrade is supporting further investment and economic activity along the corridor;
- It is expected that the full economic benefits of improvements along the A1 Corridor will take a number of years to fully manifest;
- There is anecdotal evidence however that some impact is already being seen in terms of investor confidence and activity in the commercial property market. Locations that offer similar levels of access to A1 as Colburn in Richmondshire are seeing increased interest as they are cheaper than sites directly on A1 but provide fairly good access;
- Richmond is an important location for the District and provides an established office and industrial market offer. Richmond fulfils an established role in providing for the business premises needs of smaller, higher value businesses in the town centre and larger businesses of a more diverse nature nearby on the Gallowfields Trading Estate. The historic characteristics of the area mean that there are physical constraints in terms of both the existing offer and potential for provision of new employment premises;
- Catterick Garrison/Colburn does not have the physical constraints that Richmond has and offers good access to the A1. An important investment has been made in the A6136, providing a package of road junction improvements to improve traffic flow between the A1, Colburn and Catterick Garrison town centre. Significant property investment and development activity has also taken place in the area in recent years, enhancing retail and leisure opportunities;
- Colburn Business Park plays an important role in providing a different offer, and in particular larger and more modern units. There is also evidence of local

businesses in this area seeking opportunities to expand or acquire larger premises;

- Looking forward, there are three potential catalysts for future employment growth in the Catterick Garrison/Colburn area: (i) Completion of the A1 upgrade; (ii) Expansion of personnel numbers at Catterick Garrison; and (iii) Increase in population due to concentrated housing growth;
- The completion of the A1 upgrade is expected to contribute toward increased investor confidence in the market for employment premises along the A1 corridor. Colburn Business Park has a unique locational advantage and an established history of successful employment activity to capitalise on the improved market conditions. The future expected expansion of personnel numbers at Catterick Garrison is also anticipated to generate a positive impact on the market. The increase in population due to concentrated housing growth will increase the available workforce and custom;
- The full beneficial economic and market impacts timing of these three potential catalysts is expected to occur over coming months and years;
- The A1 improvements may help to strengthen Brompton on Swale's position as an industrial location although demand is still most likely to be from local and regional businesses. It is hard to predict the balance of this effect and the potential for demand to shift toward Catterick Garrison/Colburn;
- Leyburn provides an established market offer and generally performs well in serving the needs of its wider rural hinterland;
- Scotch Corner provides a distinct offer to that in other parts of the District. Its catchment is very different to the Catterick Garrison/Colburn area. Located in the northernmost part of the District, it looks strongly towards Darlington and the wider Tees Valley catchment areas;
- The new Designer Outlet will be central in driving the development of this role in the future. The role that the Designer Outlet may play in stimulating further demand for employment land at Scotch Corner is currently unclear however;
- Proximity to the A1 and widened A66 could increase the ability of Scotch Corner to attract B8/Distribution uses in the future. There could be potential to access the market for strategically significant, regional-scale B8 uses. There are many other locations which are already well established in this market however;
- There are also further opportunities for businesses outside of the main areas, including locations such as Aske, Skeeby and Melsonby. These areas provide a range of potential opportunities for rural diversification;
- Whilst data on employment land delivered is only available in the most recent years (2014/15 to 2016/17), AMRs provide a useful picture of main events in the market. The data shows that the greatest proportion of total B-class space delivered over the period was B1a (52%).

5 Summary of Site Assessments

5.1 Overview of Approach

This section provides an overall summary of the process for carrying out the site assessments. It also documents the findings.

In total, 28 sites have been appraised. The source of the sites is a combination of information from the Richmondshire Joint Employment Land Review (2007), the Employment Land Review Update (2012), the Richmondshire Local Plan 2012 -2028: Core Strategy (adopted December 2014), and Strategic Housing and Employment Land Availability Assessment – Call for Sites (2017). The use of the information from the Call for Sites process allows for consistency with any future work that RDC may carry out in assessing sites for their potential to accommodate residential development.

The methodology for considering each site follows the policy approach set out in the NPPF (2012)¹² and the guidance set out in the PPG (2014)¹³. The methodology was agreed with RDC in February 2018. Our approach is intended to be consistent with the Council’s SHLAA. This should result in all sites for housing and employment being considered in the same way.

Site visits were carried out throughout February and March 2018, with each site visited at least twice, and site proformas completed on-site. The findings of the assessment were discussed and debated at the Duty to Co-operate workshop held by RDC on the 27th March 2018.

A proforma was used to capture the required information for each site (this is provided in Appendix 2).

5.2 Site Assessment Method

The site assessment method consisted of the following stages:

Stage 1: Initial Sift

The initial sift is broadly consistent with the SHLAA approach. However, policy related sifts have been removed, as it is considered that the ELR process should (at this stage) be objective and ‘policy-off’.

Sites were ruled out if:

- Covered by European or national designation.
- Specifically identified within a conservation area statement as contributing to the significance of the conservation area and heritage assets and their setting.
- Inaccessible or where achievement of appropriate access is likely to be economically unviable.

¹² National Planning Policy Framework (2012) – see especially Paragraphs 150 onwards, and in particular Paragraph 160 and Paragraph 161:
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf

¹³ National Planning Practice Guidance (2014) – Housing and economic land availability assessment:
<https://www.gov.uk/guidance/housing-and-economic-land-availability-assessment>

Stage 2: Deliverability Assessment

This information was gathered through desk-based research, use of call for site information, discussion with the Ministry of Defence and a site visit. The deliverability assessment considered the following factors in line with NPPF and PPG and reported on the overall deliverability of each site:

1. Developable Area
2. Suitability
3. Availability
4. Achievability

These are outlined as follows.

1. Confirm Developable Area or Plot Ratios

This was done through considering the information received from the Call for Sites process, but also through the use of standard comparators that help translate the overall gross site area figure, to a net developable area figure.

The plot ratios / developable area has been developed to align with the SHLAA. The following net developable area has been used. The exact plot ratios would only be known when the mix of employment uses (B1, B2 and B8) is known:

Site Size	Net Developable Area (Plot ratio)
0.5 hectares or less	100% (1.00)
0.5 to 2 hectares	90% (0.90)
2 hectares or more	70% (0.70)

2. Suitability

Professional judgement was used to consider site-based constraints and other planning related datasets and information to determine whether the site can be considered suitable. The full set of suitability criteria set out above are consistent with paragraph: 019 Reference ID: 3-019-20140306 of the PPG.

If the site had an extant planning permission for employment it was considered suitable.

3. Availability

This was determined by ascertaining whether the site was identified as an employment growth support area within the Richmondshire Core Strategy, was previously identified within the Employment Land Review (2007) and (2012), or has been promoted through the Strategic Housing and Employment Land Availability Assessment – Call for Sites (2017); or has an extant planning permission.

A site was considered available if:

- It is identified as an employment growth support area within the Richmondshire Core Strategy.
- It was previously identified within the Employment Land Review (2012).
- It has been promoted through the SHELAA (2017) Call for Sites.
- The site has an extant planning permission.

However, if a site did not meet the above criteria, but there was no evidence that it isn't available then it was considered available but phased outside the first five years of employment land supply.

4. Achievability

A site was considered achievable for development where there was a reasonable prospect that it could be developed for employment at a particular point in time. The achievability and economic viability of sites is affected by delivery, market and cost factors. The following factors were considered:

- If a site has planning permission it is considered achievable in years 0-5.
- If site clearance is required i.e existing buildings on the site or the site is still in use then it is phased later in the trajectory.
- If a site requires a neighbouring site to secure access it then the neighbouring site will be phased first.

Sites were considered to be achievable if none of the constraints identified are likely to result in effects on delivery, market, or cost factors. Where a site was not considered to be suitable or available or both, it was deemed to be not achievable.

Where constraints are identified, the assessment considered what action would be needed to remove or mitigate the constraints, along with when and how this could be done. Recommendations for overcoming identified constraints were provided for each site considered and factored in to determining the timescale for development.

Stage 3: Summarising Deliverability

In order to summarise the assessment and give an overview on whether the site is deliverable, the following factors were drawn together:

- If a site has an extant planning permission it was considered to be deliverable, unless evidence suggested the site is no longer deliverable.
- If physical and environmental constraints indicated that the site was not suitable (e.g. inability to access the site with no possible mitigation) then it was deemed to be not deliverable.
- If the site was not available for development at the time of the production of the ELR, then it was not considered to be deliverable.
- An indicative suggestion of where a site may feature in the emerging Local Plan's delivery trajectory. This was based on a summary of data collected – and set out the sites in tranches: 0-5 years, 6-10 years, and 11-15 years.
- An indicative suggestion of floorspace was provided, based on high-level analysis of recent employment land and floorspace delivery data, an understanding of the potentiality of the site, and the demand analysis.

5.3 Summary of Sites

Figure 5.1 provides a summary of the 28 sites that have been assessed.

Figure 5.1: Summary of Sites Assessed in Employment Land Review

Site Name	Location	Gross Site Area (Ha)	Net Developable Area (Ha)
Land to Rear of Tranquillity, Gatherley Road	Brompton on Swale	2.75	1.93
Broken Brea Farm	Brompton on Swale	3.60	2.52
Land West of Broken Brea Farm	Brompton on Swale	6.40	4.48
Smart Garden Centre, Scorton Crossroads	Brompton on Swale	0.61	0.55
Land to the East of Gatherley Road	Brompton on Swale	3.66	1.67*
Land at Station Road	Brompton on Swale	0.41	0.41
Catterick Central Junction	Catterick Village	6.46	4.52
Former Civil Service Club	Catterick Garrison	1.80	1.62
Ypres Lines	Catterick Garrison	3.20	2.24
Land West of Sports & Leisure Centre	Catterick Garrison	3.00	2.10
Land at Shute Road	Catterick Garrison	1.30	1.17
Camp Centre Garage	Catterick Garrison	0.30	0.30
Land East of Walkerville Industrial Estate	Colburn	4.60	3.22
Land Adjacent to Lidl	Colburn	1.87	1.68
Land to the East of Giles Park	Colburn	0.90	0.81
Land to Centre of Colburn Business Park	Colburn	1.02	0.92
Land to North of Colburn Business Park	Colburn	0.74	0.67
Land off Chartermark Way	Colburn	2.40	1.68
Colburndale Phase 3	Colburn	0.21	0.21
Land to North of Badger Court, Harmby Road	Leyburn	0.30	0.30
Land to East of Badger Court, Harmby Road	Leyburn	0.61	0.55
Land East of Gallowfields Trading Estate	Richmond	2.79	1.95
Land West of Designer Outlet	Scotch Corner	12.00	8.40
Land South of Barracks Bank	Scotch Corner	21.00	14.70
Designer Outlet Site	Scotch Corner	7.00	4.90
Caravan Park	Scotch Corner	2.85	2.00
Dalesway Lodge	Scotch Corner	0.38	0.38
Land East of A6108	Scotch Corner	0.92	0.83
TOTAL		93.08	66.71

* Net Developable Area figure is lower than the standard formula (70% of gross site area), as a result of more specific information being provided by the landowner / agent.

5.4 Overall Findings

In overall terms, the 28 sites represent an assessed potential land supply of 93.08 hectares (gross), and 66.71 hectares (net). Given the nature of the sites put forward, the assessment has demonstrated that all of the sites are ‘suitable’ for employment

purposes; with none of the sites featuring constraints that would be so significant as to prevent a development proposal from potentially coming forward.

Looking at the potential supply in more detail it can be seen that the scale of land supply across the different broad locations varies considerably across the District.

Figure 5.2: Total Potential Land Supply by Broad Location / Settlement

Location	Total Gross Site Area (Ha)	Total Net Developable Area (Ha)
Brompton on Swale	17.43	11.56
Catterick Village	6.46	4.52
Catterick Garrison	9.60	7.43
Colburn	11.74	9.19
Leyburn	0.91	0.85
Richmond	2.79	1.95
Scotch Corner	44.15	31.21
TOTAL	93.08	66.71

After analysing whether the sites are deemed to be ‘available’ and ‘achievable’ (and ultimately deliverable), it is possible to indicatively set out the timescales for when sites could be delivered across Richmondshire. The analysis of when sites are deemed to be capable of being delivered is set out in figures 5.3 - 5.6 below.

It is important at this stage to highlight that the timescales for delivery are subject to change; with timescales altered by the nature of the commercial market in the local area, and the willingness of each individual landowner. As noted in the PPG guidance, each review of the employment land supply should look again at the availability and achievability information to understand whether circumstances may have change.

Figure 5.3: Total Potential Land Supply by Broad Location / Settlement (Gross Site Area)

Location	0 – 5 years	6 – 10 years	11 – 15 years	15 years +
Brompton on Swale	NA	8.28	9.15	N/A
Catterick Village	N/A	6.46	N/A	N/A
Catterick Garrison	3.20	0.30	6.10	N/A
Colburn	4.16	2.98	4.60	N/A
Leyburn	0.91	N/A	N/A	N/A
Richmond	N/A	N/A	2.79	N/A
Scotch Corner	7.00	37.15	N/A	N/A
TOTAL	15.27	55.17	22.64	0.00

Figure 5.4: Total Potential Land Supply by Broad Location / Settlement (Gross Site Area)

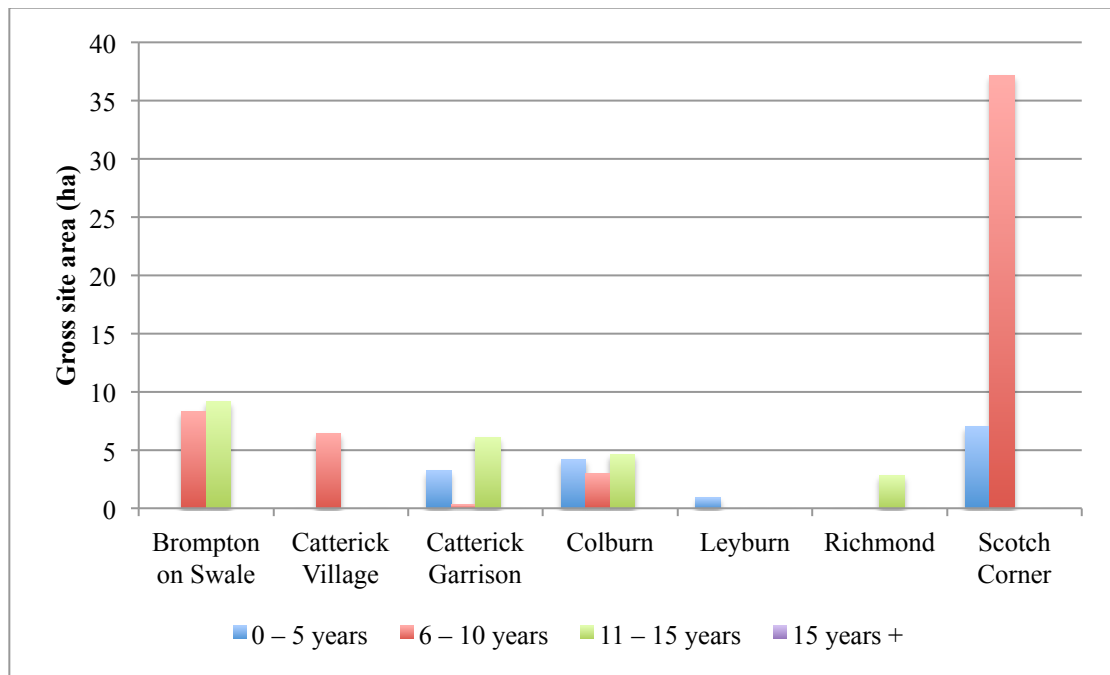
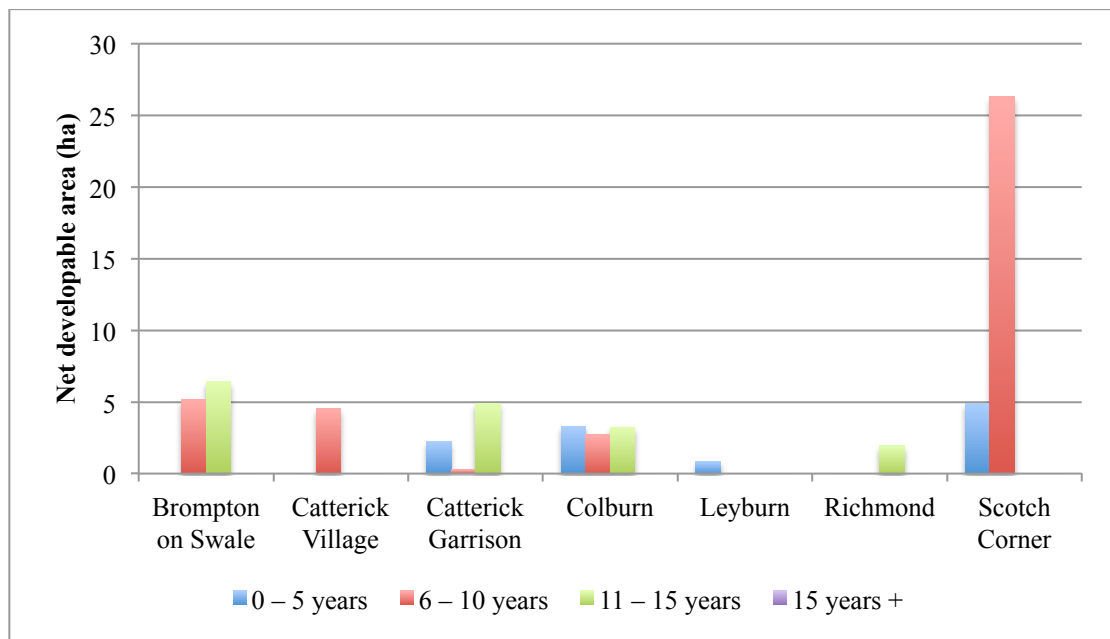


Figure 5.5: Total Potential Land Supply by Broad Location / Settlement (Net Developable Area)

Location	0 – 5 years	6 – 10 years	11 – 15 years	15 years +
Brompton on Swale	N/A	5.15	6.41	N/A
Catterick Village	N/A	4.52	N/A	N/A
Catterick Garrison	2.24	0.30	4.89	N/A
Colburn	3.26	2.70	3.22	N/A
Leyburn	0.85	N/A	N/A	N/A
Richmond	N/A	N/A	1.95	N/A
Scotch Corner	4.90	26.30	N/A	N/A
TOTAL	11.25	38.97	16.47	0.00

Figure 5.6: Total Potential Land Supply by Broad Location / Settlement (Net Developable Area)



5.5 Analysis of Sites in Broad Locations/Settlements

Based upon the overall analysis of the sites, there are a series of more specific considerations that emerge in relation to the broad locations/settlements across Richmondshire. These are set out below.

Brompton on Swale

Brompton on Swale benefits from good proximity to the A1 (M) and the improvements to the strategic highway mean that sites in this location are easily accessible.

The site assessments indicate that there is only a modest amount of land that is available in the short term (0 to 5 years). In overall terms, whilst sites in Brompton on Swale are suitable and available, there are question marks over the attractiveness of these sites to the market, and subsequent queries over the likelihood of investment being forthcoming to deliver economic development on these sites.

Catterick Village

The site identified at Catterick Central Junction benefits from excellent access and connectivity to the A1 (M) via the new roundabout / junction layout. The site itself is suitable for development, albeit there are residual issues associated with flood risk. It is understood that proposed mitigation, through the creation of a flood storage reservoir, west of the A1 (M) is expected to reclassify the flood risk zones.

The site's location adjacent to the A1 (M) is a clear advantage, as is the ability to utilise the recently upgraded infrastructure. This means that the site is likely to be attractive to the market. However, some caution is required given the scale of the site in the context of Richmondshire. It is unclear as to whether a site of this size (it would be comparable to the scale of the approval given to the Designer Outlet site) would be forthcoming in the short term - especially given the findings from Section 3 and Section 4. As such, it is likely that delivery of the site would be in the medium term.

Catterick Garrison

All sites within Catterick Garrison are suitable, and having been promoted through the call for sites process, can be deemed to be available. The majority of the sites are under the single ownership of the Ministry of Defence, which means deliverability is likely to be more straightforward.

It is clear that a significant amount recent economic development has taken place at Catterick Garrison, with retail, leisure, and small-scale B1/B2/B8 uses being built out. As such, market demand for certain economic development may have already been met in the short term. Furthermore, it is clear that some of the sites put forward are also being considered for alternative (non-economic development related) uses. As such, only a relatively modest amount of land is deemed to be deliverable in the short term (0 to 5 years).

Colburn

Sites within Colburn are suitable, although the site known as 'Land East of Walkerville Industrial Estate' would require a significant upgrade to the highway infrastructure in order to provide access to the site.

Sites within the Colburn Business Park benefit from substantial previous infrastructure investment, and appear to be attractive to the market with development applications pending on two of the sites. Combined with the enhanced connectivity provided by the upgrades and new junction to the A1 (M) mean that deliverability in the short term (0 to 5 years) appears possible.

Looking ahead to future decision-making on economic development policies and employment land allocations, the Council will need to understand the inter-relationship between sites in Catterick Garrison and Colburn, and the degree to which they operate within the same sub-area, and whether delivery in one location will affect the market demand for sites within the other location. In addition, the Council will need to consider the degree to which the market demand in Colburn is for alternative (non-economic development related) uses.

Leyburn

Sites within Leyburn are suitable, available and appear achievable and deliverable in the short term (0 to 5 years). It is recognised that these sites (and Leyburn as a whole) sit within a different sub-area to the other broad locations/settlements. It is also recognised that the demand and requirements in Leyburn are expected to cater to indigenous demand and support a thriving settlement. Nevertheless, the sites are of a scale that would be a good match with the potential demand requirements.

Richmond

The site assessed in Richmond is deemed to be suitable, available and achievable in the longer term (11 to 15 years) due to existing Richmond wide transport constraints. However, looking ahead to future decision-making on economic development policies and employment land allocations, the Council will need to understand the inter-relationship between this potential new supply and the existing role and function of the Gallowfields Industrial Estate. Levels of churn, replacement, and re-use on the Gallowfields Industrial Estate may mean that the demand for new supply is not as great as in other locations across the District. This, in turn, may mean that the deliverability of the potential land supply at 'Land East of Gallowfields Trading Estate' is suppressed. RDC have confirmed that they intend to produce a Richmond wide transport assessment to understand the existing constraints in relation to HGVs accessing the site through the historic core of Richmond.

Scotch Corner

Land at Scotch Corner is deemed to be suitable for development. However, the sites assessed can be split in two – with, on the one hand a series of very large, greenfield sites that require infrastructure investment in order to be capable of being delivered; and, on the other hand a series of small, brownfield sites that benefit from infrastructure, but are either currently in use, or feature vacant/derelict buildings that would require clearance before sites could be deliverable. As such, there are question marks over the availability and achievability of sites at Scotch Corner.

The site identified as 'Designer Outlet Site' has been assessed, and is deemed to be deliverable in the short term (0 to 5 years). Given it is expected that the build out of the Designer Outlet will commence imminently, the Council will need to consider how this would affect future decision-making on economic development policies and employment land allocations.

The two other large, greenfield sites at Scotch Corner represent a substantial potential future land supply. Individually, both sites are of a scale that exceeds the current

extant policy position in Core Strategy Policy SP5. The Council will need to carefully consider the implications for the District should sites at Scotch Corner feature in future economic development policies and employment land allocations.

Summary

- All sites are deemed suitable for employment purposes, and therefore the overall total potential supply equals 93 hectares (gross), and 67 hectares (net). The 'Catterick Central Junction' site does currently sit within flood risk zone 3 (meaning it could have been classified as unsuitable for development), but proposed mitigation, through the creation of a flood storage reservoir west of the A1 is expected to reclassify the flood risk zones in this location;
- Each broad location/settlement has some identified potential supply, and certain locations (e.g. Brompton on Swale, Colburn and Scotch Corner) have a significant potential supply of land;
- The total potential supply is skewed by a small number of substantial sites (e.g. 6.4 hectares at Brompton on Swale, 6.46 hectares at Catterick Village, and 21 hectares and 12 hectares at Scotch Corner);
- Whilst the overall scale of potential supply is substantial, not all sites are immediately available and achievable. Some sites have active uses on them, which would require demolition and clearance before new development could occur; others require infrastructure investment in order to unlock their development potential; certain sites are considered less attractive to the market; and some sites, although they have been put forward as part of the Call for Sites process, are being considered for uses other than employment;
- This affects the scale of potential supply that is identified as being available and achievable in the short term (0 to 5 years), versus that which is more likely to be available and achievable over the medium term (6 to 10 years), and longer term (11 to 15 years). Out of the 93 hectares (gross), only 15 hectares is considered to be deliverable in the short term;
- Potential supply in Richmond is limited to one site. This may be due to the constrained historic nature of the town, and/or the effect of the relationship between the town centre and the Gallowfields Trading Estate. And so, whilst the identified potential site is suitable, available, and achievable, it will only be achievable in the longer term due to transport capacity issues in Richmond. This is being investigated through a Richmond Transport Assessment. RDC will need to reflect on whether this is a robust position given the role and function of Richmond, and its status in both extant and emerging policy;
- Potential supply at Scotch Corner is substantial, and represents nearly half of the overall potential supply in the District (44 hectares out of 93 hectares – 47%). It should be noted that the supply figures for Scotch Corner include the site earmarked for the Designer Outlet. Nevertheless, even if this site was to be disregarded, on the expectation that the Designer Outlet scheme commences in the very near future – then the supply at Scotch Corner still represents 40% of the overall potential supply across the District. The impact of this quantum of supply on the inter-relationship between Scotch Corner and the other settlements and locations across the District could be far-reaching, and will require careful further consideration by RDC.

6 Future Requirements for Employment Land

6.1 Overview

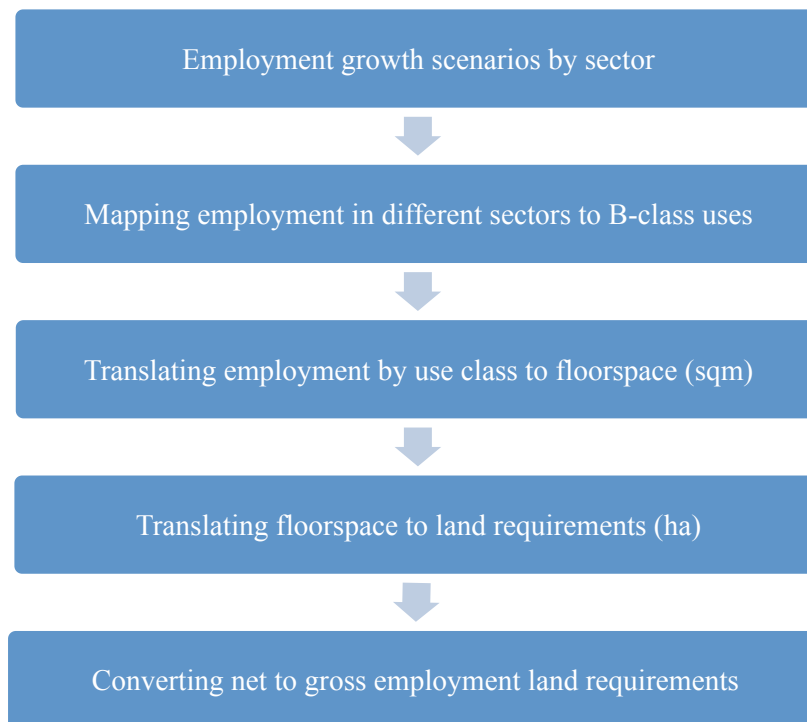
This section assesses the total requirement for additional employment space in Richmondshire in the period to 2035. The assessment considers demand across industrial sectors making up the economy and the implications in terms of the types of B-class use space required.

6.2 Approach

Overview

The following diagram illustrates the key stages of the approach to estimating the future requirement for employment space. This process requires a number of assumptions in order to convert forecasts of growth in jobs across different industrial sectors to employment floorspace and land requirements. These are outlined in following sub-sections.

Figure 6.1: Approach to Assessing Land Requirements



Source: Edge (2018).

Employment growth scenarios

The ELR adopts a scenario-based approach to employment growth. This responds to the need for the ELR to plan sufficiently for growth and take into account the potential range of employment growth that could occur.

There are broadly three main forecasting techniques that can be used to forecast employment land requirements. These are:

- **Labour demand forecasts** – based on an economic model, these predict changes in employment by sector;
- **Labour supply forecasts** – these take demographic dynamics as the driver and forecast changes in employment; and
- **Projections of past take-up** – these roll forward trends in past take-up of employment land and floorspace.

There are advantages and disadvantages associated with each:

- Labour demand forecasts can be useful in understanding expected future changes in the scale and sectoral composition of employment. They are inherently limited however by their strong reliance upon past trends to drive econometric forecasting models.
- Labour supply based techniques have similar advantages and disadvantages.
- Projecting forward on the basis of past take-up has the advantage of utilising available historic evidence on actual realised market demand. The disadvantage with this approach however is that projecting take up rates forward on a linear basis assumes that the property market and economy will continue to behave as it has in the past, and that demand is not constrained or subject to change by other factors. This is a significant constraint in terms of establishing an informed view of future demand.

The approach applied in the ELR is based on a combination of labour demand and supply forecasts, which are considered in the context of evidence on historic, market take-up. The advantage of this approach is that it enables both market conditions and the expected impacts of economic development policy to be taken into account. Overall, the approach is based on the consideration of a range of evidence, both quantitative and qualitative, in order to inform the development of alternative scenarios for future growth.

This approach is consistent with Planning Practice Guidance (PPG) that states that Plan makers should consider:

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

Use of Regional Econometric Model (REM) ‘Baseline’ forecasts

The employment growth scenarios developed are based on the Regional Econometric Model (REM) model. This model is produced by Experian and published quarterly in March, June, September and December.

The REM model provides a forecast of FTE employment growth at the district, regional and national level. The employment figures include the armed forces. It is important to note however that these are trend based forecasts and do not include any

planned public/private investments. For example, they are unaffected by the prospects for military change at Catterick Garrison.

The ELR utilises REM forecasts from both the latest March 2018 release and September 2016. The latter has been used as part of the 2017 SHMA analysis.

There are significant differences between September 2016 and March 2018 projections from the REM. Overall, the March 2018 release projects a contraction of 400 jobs in Richmondshire over the period 2014-2035 whereas the September 2016 release projects an expansion of 1,200 jobs. This difference is primarily driven by slower forecast growth in the accommodation, food services and recreation sector and decline being projected in additional sectors (including agriculture and wholesale & retail) in the March 2018 release. The March 2018 release represents a pessimistic forecast for Richmondshire. In particular, it is projecting a significantly faster contraction in manufacturing than regionally (-38% vs. -15%) as well as a decline in professional services vs. an expansion regionally (-7% vs. +19%)

The ELR should plan for a range of scenarios. Reflecting this, a combination of the September 2016 and March 2018 releases are used to inform the employment growth scenarios tested.

The York, North Yorkshire and East Riding LEP uses the REM model to inform its expectations in terms of future employment growth. Use of the model to inform the employment growth scenarios is therefore important in ensuring alignment with the LEP. In policy terms, the LEP has recently moved away from targeting figures for overall employment growth in the LEP economy. Instead, it is placing an emphasis on supporting an improvement in the quality of jobs and enabling employment growth through strategic interventions. The LEP will be developing a Local Industrial Strategy but this is at an early stage. Currently, they use the REM 'baseline' forecasts. It is understood that the LEP may explore 'policy on' scenarios for the future but this will be with the objective of informing policy to support growth rather than to establish aggregate employment targets for the economy.

Demographic labour force projections

Demographic labour force projections are included in the 2017 SHMA. For each of the Richmondshire demographic scenarios, Edge Analytics have applied assumptions to derive an estimate of the changing size of the labour force that the population growth implies and the level of employment growth that could be supported under these assumptions.

Having considered the potential change in labour force capacity and future economic forecasts, the SHMA concludes that the starting point supports the growth of 50 jobs each year. This broadly reflects the September 2016 REM that was considered in the work, indicating an annual increase of 57 FTE jobs in Richmondshire.

When compared with the level of jobs growth implied by the Richmondshire demographic scenarios, the September 2016 REM forecast implies a higher level of jobs growth than all but the PG-Long-Term-X scenario.

Figure 6.2: Demographic labour force projections in 2017 SHMA

Labour force and jobs-growth outcomes 2014-2035		
Scenario	Change in labour force 2014-35	Average Annual Jobs Growth
PG-Long-Term-X	2,340	125
PG-Short-Term-X	753	50
PG-Long-Term-X-Fixed	-217	4
SNPP-2012	-500	-9
PG-Short-Term-X-Fixed	-2,568	-107
SNPP-2014	-2,218	-90

Source: SHMA (2017).

Future catalysts for employment growth

As identified in sections 3 and 4, there are three particularly significant catalysts for future employment growth in Richmondshire:

1. Completion of the A1 upgrade; and
2. Expansion of personnel numbers at Catterick Garrison; and
3. Retail development at Scotch Corner.

The completion of the A1 upgrade is expected to contribute towards increased investor confidence in the market for employment premises along the A1 corridor. This could improve demand for B-class employment space. It is typical for the full economic and property market benefits of highway upgrades of this type to take a number of years to be realised. The future expected expansion of personnel numbers at Catterick Garrison is also anticipated to generate a positive impact on the market. Retail development at Scotch Corner will increase employment in the retail sector in Richmondshire substantially and may support related growth in leisure uses.

The full beneficial economic and market impacts of these catalysts is expected to occur over coming months and years. Accordingly, it is important that future scenarios for employment growth in the ELR consider the implications for employment land needs over the plan period.

The completion of the A1 upgrade is expected to have the most influence on the demand for B-class employment space. The expansion of Catterick Garrison and the retail development at Scotch Corner are anticipated to impact primarily on retail use class space, rather than B-class employment space. Retail impacts will be considered by a separate Retail Study being undertaken and are outside of the scope of the ELR analysis of B-class uses.

Description of scenarios

These employment growth scenarios reflect a range of different potential outcomes for employment growth in Richmondshire and have been established through review of a number of independently produced employment forecasts.

In order to establish scenarios for future employment growth, it is necessary to make a number of informed assumptions. The following table outlines the parameters of the

scenarios including the source of employment growth projections and, where applicable, key assumptions applied in the ELR.

Figure 6.3: ELR Employment Growth Scenarios – 2014 to 2035

Scenario	Employment Growth 2014-2035		Source	ELR assumptions
	Total	Annual average		
Low	-410	-20	Independently produced 'baseline' REM forecast (April 2018 release)	As per forecast
Medium	1,200	57	Independently produced 'baseline' REM forecast (September 2016 release)	As per forecast
High	2,288	109	<p>Independently produced 'baseline' REM forecast (April 2018 release)</p> <p>Adjustments made to forecast drawing on 2018 regional forecasts and 2016 release for Richmondshire</p>	<p>Adjustments made:</p> <ul style="list-style-type: none"> • Accommodation, Food Services & recreation – Grows at higher rate as per 2016 REM forecast • Agriculture, Forestry & Fishing – Employment constant as per 2016 REM forecast • Information & Communication – Grows at higher rate as per 2016 REM • Manufacturing – Declines more slowly in line with regional forecast in 2018 REM • Professional & Other private services – Grows at half the rate of regional forecast in 2018 REM • Transport & storage – Grows in line with regional forecast in 2018 REM • Wholesale & retail - Grows in line with regional forecast in 2018 REM

Source: Edge (2018) drawing on independently produced employment 'baseline' REM forecasts and local evidence.

Anticipating future employment growth is particularly challenging at this time. The current macroeconomic environment in the UK is unique. On the one hand, there is considerable uncertainty around aspects relating to the potential departure of the UK from the European Union. On the other, key economic changes locally may act to support greater economic growth in Richmondshire than in recent years (in particular, the completion of the A1 upgrade, expansion of Catterick Garrison and development of the Designer Retail Outlet at Scotch Corner).

Reflecting this range of possibilities, in this ELR the requirement for future employment space is assessed under a range of future scenarios for economic growth over the period to 2035. This enables consideration of the potential impacts of different levels of economic performance in Richmondshire.

Richmondshire's future economic performance will depend on a number of factors. These include the impacts of the three identified economic drivers once these have been fully realised, specific policy measures to stimulate a higher rate of local economic growth and the broader macroeconomic performance of the UK economy.

The scenarios can be considered to represent different outcomes. Whilst each of the REM forecasts (2016 and 2018 releases) could be considered robust in their own right, they remain trend-based forecasts that do not take into account some of the evidence collected for this assessment. Reflecting the emphasis of the NPPF on supporting sustainable economic growth, we have made amendments to the REM forecasts to reflect these local considerations to consider a 'high' scenario.

Broadly, the low scenario is considered to represent the pessimistic case without taking account of the three identified local economic drivers and the impact of economic development policy. It is based on independently produced 'baseline' forecasts from the April 2018 REM, produced using econometric modelling of employment.

The medium scenario represents a more optimistic case without taking account of the three identified local economic drivers and the impact of economic development policy. It is based on independently produced 'baseline' forecasts from the September 2016 REM, produced using econometric modelling of employment.

The high scenario represents a more optimistic scenario, taking into account the potential positive impacts generated in the future by the three identified local economic drivers. In broad terms, this could also be considered to represent a 'policy on' environment with higher growth being achieved in specific sectors. In particular, this scenario assumes that the rate of decline in the manufacturing sector in Richmondshire is slower than is forecast by the 2018 REM, and in line with the slower contraction forecast for the Yorkshire and Humber region as a whole. It also assumes modest growth in professional and other private services (although still half the rate projected by the 2018 REM for the Yorkshire and Humber region).

The overall Compound Annual Growth Rate (CAGR) under the three scenarios is as follows:

- Low (-0.1%)
- Medium (+0.2%)
- High (+0.5%)

The scenarios tested project growth of between -20 and +109 jobs per annum. Comparing these levels with historic trends in Richmondshire is challenging due to constraints in obtaining consistent data over a sufficiently long time period to smooth out the effects of the economic cycle.

Mapping employment in different sectors to B-class uses

The employment forecasts that inform the employment scenarios provide forecasts for 12 industrial sectors.

Through the analysis undertaken for the ELR, the composition of employment in these sectors has been considered in order to estimate the percentage of employment that can typically be expected to take place in B-class employment floorspace. The proportion of employment in different sectors that can be expected to take place in the following B-class sectors has been estimated:

- Office - Use Classes B1a (office) and B1b (research & development);
- Industrial - Use Classes B1c (light industrial) and B2 (industrial);
- Distribution - Use Class B8 (warehouse and distribution).

The analysis does not estimate requirements for retail floorspace.

Figure 6.4 outlines the distribution of space requirement by use class for employment growth in each of the 12 industrial sectors. For example, this shows that 100% of new jobs in the finance & insurance sector are expected to require B1 office space.

Figure 6.4: Employment sectors to B-class uses

	Sectors	Use class			
		Office (B1)	Industrial (B1c/B2)	Distribution (B8)	Total (B class)
1	Accommodation, Food Services & Recreation	0%	0%	0%	0%
2	Agriculture, Forestry & Fishing	0%	0%	0%	0%
3	Construction	0%	0%	0%	0%
4	Extraction & Mining	0%	0%	0%	0%
5	Finance & Insurance	100%	0%	0%	100%
6	Information & Communications	100%	0%	0%	100%
7	Manufacturing	0%	100%	0%	100%
8	Professional & Other Private Services	100%	0%	0%	100%
9	Public Services	10%	0%	0%	10%
10	Transport & Storage	0%	0%	79%	79%
11	Utilities	0%	84%	0%	84%
12	Wholesale & Retail	0%	12%	35%	54%

Source: Edge (2018).

These assumptions are based on professional experience and established convention applied in undertaking ELRs nationally as well as best practice guidance on Employment Land Reviews. A review of the local evidence base, including local planning applications, has also informed the process.

Not all employment growth will be associated with allocated employment sites; a considerable proportion of jobs in any area will be associated with existing facilities, such as public health and education that will accommodate significant employment growth within existing premises. Accordingly, it is important to take account of the distinction between growth in economic activity that requires additional employment and that instead arises from productivity gains.

Translating employment by use class to floorspace (sqm)

In order to translate employment by use class into floorspace requirements, an average employment density (sqm per FTE job) is applied.

In this ELR, recent guidance in relation to employment densities published by the HCA¹⁴ is utilised, as outlined in Figure 6.5.

Figure 6.5: Employment densities

Use type	sqm per job	HCA Guide
Office space (B1, a, b)	17	Average of densities across B1a and B1b uses
Industrial space (B1c/B2)	42	Average of densities in B1c and B2
Distribution (B8)	81	Average of densities in B8

Source: Edge (2018) drawing on HCA Employment Density Guide.

Recent local evidence drawn from planning applications in Richmondshire has been reviewed in order to validate the application of these densities to Richmondshire.

Translating floorspace to land requirements (ha)

Floorspace is translated into land requirements by applying a plot ratio. Plot ratios describe the difference between the level of employment floorspace on a site and the site area. A plot ratio of 1 means that a development of 10,000 sqm GEA of floorspace would sit on a 1-hectare (10,000 sqm) site. Plot ratios are influenced by the height of buildings, parking standards and other space requirements on the site (e.g. green space and communal areas).

In this ELR, the average plot ratios applied are outlined in the following table.

Figure 6.6: Plot ratios

Use type	Plot ratio
Office (B1, a, b)	0.4
Industrial (B1c, B2)	0.4
Distribution (B8)	0.4

Source: Edge (2018)

This figure is in line with recognised convention applied in ELRs across the country. A review of recent local planning applications in Richmondshire was also undertaken to validate this assumption.

Converting net to gross employment land

The net employment land requirement figure is only a part of the process in understanding employment land requirements. Relying on the net figure alone could result in a significant underestimate of land required to support future economic development.

There is a need to make allowances for:

- Replacing the expected future loss of employment sites; and
- Providing for choice and competition in the market.

There is no standard approach to calculate the future loss of employment sites and typically a simple assumption that a percentage of stock will be replaced each year is

¹⁴ 'Employment Density Guide' 3rd Edition, HCA (November 2015).

made. In some cases, past losses are projected forward. The analysis within this section does not take into account existing commitments. This aspect is considered elsewhere in the ELR.

Allowing for choice and competition in the market is also important. Land can remain in the development pipeline for a long time without delivering new floorspace. At any one time there is a need to ensure that there is enough readily available (unconstrained) land to meet the gross requirement for each employment use. It is not desirable to have an exhausted land supply at the end of the plan period i.e. no choice available. ELRs nationally typically apply a margin of between 20% and 40%. In this ELR, a margin of 50% applied to account for market choice. This slightly higher rate reflects the diversity of demand in the District.

6.3 Employment growth scenarios

In the low scenario, overall employment is projected to contract by a total of 410 jobs over the period from 2014 to 2035; this is equivalent to an annual average contraction of 20 jobs.

In the medium scenario, overall employment is projected to expand by a total of 1,200 jobs over the period from 2014 to 2035; this is equivalent to an annual average growth rate of 57 jobs.

In the high scenario, overall employment is projected to expand by a total of 2,288 jobs over the period from 2014 to 2035; this is equivalent to an annual average growth rate of 109 jobs.

The structural pattern of growth by industrial sector for each of the employment growth scenarios is shown in Figure 6.7. Only a proportion of the growth in these sectors is assumed to translate into a requirement for core B-class space. Figure 6.8 provides an overview of projected employment growth translated into B-class floorspace class categories.

Figure 6.7: Employment Change by Sector, 2014 – 2035

Industrial Sector	Total employment change 2014-2035, FTEs		
	Low	Medium	High
Accommodation, Food Services & Recreation	790	1,500	1,547
Agriculture, Forestry & Fishing	-380	0	0
Construction	230	200	230
Extraction & Mining	-40	10	-40
Finance & Insurance	10	69	10
Information & communication	0	100	93
Manufacturing	-670	-700	-230
Professional & Other Private Services	-250	-300	307
Public Services	-20	100	-20
Transport & storage	60	100	171
Utilities	20	121	20
Wholesale & Retail	-160	0	200
Total	-410	1,200	2,288
Annual average employment change	-20	57	109

Source: Edge (2018) using independently produced ‘baseline’ forecasts. Include rounding.

Figure 6.8: B-class Employment Change translated to ELR, 2014 – 2035

Industrial Sector	Total B-class employment change 2014-2035, FTEs		
	Low	Medium	High
Accommodation, Food Services & Recreation	0	0	0
Agriculture, Forestry & Fishing	0	0	0
Construction	0	0	0
Extraction & Mining	0	0	0
Finance & Insurance	10	69	10
Information & communication	0	100	93
Manufacturing	-670	-700	-230
Professional & Other Private Services	-250	-300	307
Public Services	-2	10	-2
Transport & storage	47	79	135
Utilities	17	102	17
Wholesale & Retail	-74	0	93
Total	-922	-640	423
Annual average employment change	-44	-30	20

Source: Edge (2018) using independently produced ‘baseline’ forecasts. Include rounding.

Considering just the proportion of jobs that translate to B-class uses, only the high scenario generates an overall positive figure. The forecasts indicate an overall B-class employment change of between -922 to +423 jobs in the core B-class use categories over the period to 2035. This equates to an annual average change of between -44 and +20.

Figure 6.9 shows the breakdown of job by B-class use type. This shows that the change in jobs relating to B2 uses is negative across all three scenarios. The main driver of the change in demand for B2 industrial space is the manufacturing sector. The change in B1 related jobs is positive in the high scenario only. The main driver of the change in demand for B1 office space is the professional & other private services sector. The change in B8 related job is positive for both the medium and high scenarios. For B8 space, it is the transport & storage and wholesale and retail sectors.

Figure 6.9: B-class Employment Change translated to ELR, 2014 – 2035

Scenario	B1	B2	B8	Total b-class
Low	-242	-672	-9	-922
Medium	-121	-598	79	-640
High	409	-190	205	423

Source: Edge (2018) using independently produced ‘baseline’ forecasts. Include rounding.

Recent trend growth in employment and central projections for the future indicate a modest expansion in employment in Richmondshire over the plan period. Overall employment growth is expected to be limited. Nonetheless, there remain important potential catalysts for future growth including the completion of the A1 upgrade, expansion of personnel numbers at Catterick Garrison and retail development at Scotch Corner. The benefits of such improvements are expected to take a number of years to be fully realised.

6.4 Floorspace requirement

Drawing together the results from the alternative employment growth scenarios, Figure 6.10 summarises the net floorspace requirement up to 2035 by core B-class use. The results are based on applying the employment densities set out in Figure 6.5.

Figure 6.10: Net Floorspace Requirements (sqm), 2014 – 2035

Scenario	Sqm			
	B1	B2	B8	Total b-class
Low	-4,010	-27,871	-694	-32,575
Medium	-2,006	-24,815	6,373	-20,449
High	6,770	-7,898	16,538	15,410

Source: Edge (2018) drawing on independently produced employment ‘baseline’ forecasts and local evidence. Include rounding.

These forecasts reflect a range of potential space requirements. For office space (B1, a, b), the range is between -4,010 sqm and +6,770 sqm. For industrial space (B1c/B2), it is from -27,871 sqm to -7,898 sqm. For distribution (B8), the range of requirement is between -694 sqm and +16,538 sqm.

6.5 Net employment land requirement

Net floorspace requirements are translated into net land requirements by applying a plot ratio (using the ratios established in Figure 6.6). The resulting land requirements are set out in Figure 6.11:

Figure 6.11: Net Land Requirements (ha), 2014 – 2035

Scenario	Net land requirement (Ha)			
	B1	B2	B8	Total b-class
Low	-1.0	-7.0	-0.2	-8.1
Medium	-0.5	-6.2	1.6	-5.1
High	1.7	-2.0	4.1	3.9

Source: Edge (2018) drawing on independently produced employment ‘baseline’ forecasts and local evidence. Include rounding.

6.6 Gross employment land requirement

To allow for choice and competition in the market, a margin should be applied. This yields the gross employment land requirement. The results of applying a 50% margin are shown in Figure 6.12. This also includes the average annual land requirement for B-class space, based on the plan period.

Figure 6.12: Gross Land Requirements (ha), 2014 – 2035

Scenario	Gross land requirement (Ha)			
	B1	B2	B8	Total b-class
Low	-1.0	-6.9	0.3	-7.6
Medium	-0.1	-5.7	2.4	-3.4
High	2.5	-1.8	6.2	7.0

Source: Edge (2018) drawing on independently produced employment ‘baseline’ forecasts and local evidence.

Note: Margin only applied to positive requirements. Include rounding.

Figure 6.13 provides the average annual land requirement for B-class space.

Figure 6.13: Gross Land Requirements, Average Annual (ha), 2014 – 2035

Scenario	Gross land requirement (Ha) - Annual average			
	B1	B2	B8	Total b-class
Low	-0.0	-0.3	0.0	-0.4
Medium	-0.0	-0.3	0.1	-0.2
High	0.1	-0.1	0.3	0.3

Source: Edge (2018) drawing on independently produced employment ‘baseline’ forecasts and local evidence. Include rounding.

The preceding figures need to be adjusted to consider the proportion relating to that part of the District that lies outside of the YDNP. Figures 6.14-6.15 present these results.

Figure 6.14: Gross Land Requirements outside of YDNP (ha), 2014 – 2035

Scenario	Gross land requirement outside YDNP (Ha)			
	B1	B2	B8	Total b-class
Low	-0.9	-6.0	0.3	-6.6
Medium	-0.1	-5.0	2.1	-3.0
High	2.2	-1.5	5.4	6.1

Source: Edge (2018) drawing on independently produced employment ‘baseline’ forecasts and local evidence. Include rounding.

Figure 6.15: Gross Land Requirements outside of YDNP, Average Annual (ha) 2014 – 2035

Scenario	Gross land requirement outside YDNP (Ha) - Annual average			
	B1	B2	B8	Total b-class
Low	-0.0	-0.3	0.0	-0.3
Medium	-0.0	-0.2	0.1	-0.1
High	0.1	-0.1	0.3	0.3

Source: Edge (2018) drawing on independently produced employment ‘baseline’ forecasts and local evidence. Include rounding.

Overall, the results indicate a gross employment land requirement over the plan period in the range of -6.6 ha to +6.1 ha. This equates to an annual average of between -0.3 ha and +0.3 ha.

Across the use classes, the greatest requirement is for B8 space. There is a positive B8 requirement across all three employment growth scenarios tested. For B1 space, there is a positive requirement only in the high scenario (+2.2 ha). The requirement for B2 space is negative across all three scenarios. This is largely driven by the projected decline of the manufacturing sector in the REM forecasts.

Summary

- The ELR adopts a scenario-based approach to employment growth. This responds to the need for the ELR to plan sufficiently for growth and take into account the potential range of employment growth that could occur;
- The approach applied is based on a combination of labour demand and supply forecasts, which are considered in the context of evidence on historic, market take-up. This enables both market conditions and the expected impacts of economic development policy to be taken into account;
- The employment growth scenarios are based on the Regional Econometric Model (REM). These are trend based forecasts and do not include any planned public/private investments;
- The ELR utilises REM forecasts from both the latest March 2018 release and September 2016. The latter has been used as part of the 2017 SHMA analysis.

There are significant differences between September 2016 and March 2018 projections from the REM. The ELR should plan for a range of scenarios. Reflecting this, a combination of the September 2016 and March 2018 releases are used to inform the employment growth scenarios tested;

- There are three particularly significant catalysts for future employment growth in Richmondshire: (i) Completion of the A1 upgrade; (ii) Expansion of personnel numbers at Catterick Garrison; and (iii) Retail development at Scotch Corner;
- In the low scenario, overall employment is projected to contract by a total of 410 jobs over the period from 2014 to 2035; this is equivalent to an annual average contraction of 20 jobs;
- In the medium scenario, overall employment is projected to expand by a total of 1,200 jobs over the period from 2014 to 2035; this is equivalent to an annual average growth rate of 57 jobs;
- In the high scenario, overall employment is projected to expand by a total of 2,288 jobs over the period from 2014 to 2035; this is equivalent to an annual average growth rate of 109 jobs;
- It is important to acknowledge that the employment growth forecasts do not include:
 - The known additional jobs growth anticipated in the retail sector at the Designer Retail Outlet due to be constructed at Scotch Corner; or
 - Anticipated growth in MOD personnel numbers at Catterick Garrison.

These factors are not expected to directly impact on the forecasts for B-class uses;

- Considering just the proportion of jobs that translate to B-class uses, only the high scenario generates an overall positive figure. The forecasts indicate an overall B-class employment change of between -922 to +423 jobs in the core B-class use categories over the period to 2035. This equates to an annual average change of between -44 and +20;
- Overall, the results indicate a gross employment land requirement over the plan period in the range of -6.6 ha to +6.1 ha. This equates to an annual average of between -0.3 ha and +0.3 ha;
- Across the use classes, the greatest requirement is for B8 space. There is a positive B8 requirement across all three employment growth scenarios tested. For B1 space, there is a positive requirement only in the high scenario (+2.2 ha). The requirement for B2 space is negative across all three scenarios. This is largely driven by the projected decline of the manufacturing sector in the REM forecasts;

7 Demand-Supply Balance - Employment Land Needs

7.1 Overview

This section draws together the forecast requirement for B-class employment land in Richmondshire with the assessment of available supply in order to consider whether the District has sufficient employment land over the period to 2035.

The analysis considers both the overall demand-supply balance in the District and the balance in its constituent sub-areas. In addition, key considerations for future policy are identified.

7.2 Demand-Supply balance in the District

Section 5 and Section 6 have highlighted that there is a mismatch between potential land supply and the forecast requirement.

The sites assessed yield a potential land supply of 93 hectares, albeit only 15 hectares has been classified as suitable, available and achievable in the short term (0 to 5 years). This potential land supply figure is set against the estimated gross employment land requirement over the plan period in the range of -6.6 hectares to +6.1 hectares.

It is clear therefore that future decision-making on economic growth and employment land need not focus on the overall quantum of land, but instead can focus on identifying and allocating the right sites. This means considering the right allocation of sites in terms of quality, deliverability and location. This approach will support a balanced and sustainable economic growth strategy.

To put the figures generated by this ELR in context, the analysis shows that the current potential land supply is substantially greater than recent delivery figures, and the total quantum identified in Core Strategy Policy SP5. Furthermore, the analysis shows that the forecast future requirement figure is lower than the quantum currently identified in Core Strategy SP5.

Taken together, the figures suggest that defining and delivering a robust and effective economic growth agenda in Richmondshire will be challenging in the near future. It will require careful decision-making on which sites are put forward in future policies, and which sites may be nominated as future employment land allocations.

Looking ahead, RDC will need to consider the different requirements and land supply across the broad locations / settlements in the District. As evidenced in Section 5, the potential land supply is dominated by a number of large-scale sites. These large sites skew the overall total quantum of supply. They could also skew the locations for future employment land delivery and economic growth should they be formalised in policy and allocations. To put this in context, two sites at Scotch Corner ('Land West of the Designer Outlet', and 'Land South of Barracks Bank') would individually deliver more than the forecast future requirement.

On the demand side, the main drivers of the District are expected to be Colburn, Catterick Garrison and the A1 corridor including Scotch Corner. Three pertinent drivers of future economic growth in the District have been identified, as evidenced in Section 3 (the completion of the A1 upgrade, expansion of MOD presence at

Catterick Garrison and the Designer Retail Outlet at Scotch Corner). These drivers are expected to support increased economic growth in Colburn, Catterick Garrison and the A1 corridor around Scotch Corner. Furthermore, the York, North Yorkshire and East Riding LEP's Strategic Economic Plan and future investment focus supports further growth along the A1 growth corridor.

7.3 Demand-supply balance by sub area

Specific conclusions on the broad locations/settlements considered in this ELR are set out below.

Brompton on Swale

Brompton on Swale benefits from good proximity to the A1 (M) but appears to be less attractive to the market than other locations in the District. Sites identified and assessed appear likely to cater to the forecast demand for B8 uses, subject to landowner willingness and subsequent investment.

Catterick Village

The site identified at Catterick Central Junction benefits from good access and connectivity to the A1 (M) via the new junction. Subject to resolving any residual concerns over flood risk, the site could deliver a mix of B1/B2/B8 uses in the medium term (6 to 10 years).

Catterick Garrison

Sites in Catterick Garrison appear capable of supporting growth and demand stimulated by the MOD's expansion plans for the military garrison. The sites being owned by the MOD aid good deliverability. These sites appear capable of delivering a mix of B1/B2/B8 uses in the short term (0 to 5 years) and long term (11 to 15 years).

The sites identified as potential future land supply do however offer opportunities for other non-economic development uses.

Colburn

Sites in Colburn benefit from good access and connectivity to the A1 (M) (benefitting from a new junction). The sites assessed in this ELR appear capable of meeting forecast demand requirements for B1/B2/B8 uses.

Sites within Colburn Business Park benefit from substantial previous infrastructure investment, and appear to be attractive to the market with development applications pending. The sites within Colburn Business Park appear capable of meeting the forecast demand for B1 uses in the high employment growth scenario.

Leyburn

Sites in Leyburn are suitable, available and appear achievable and deliverable in the short term (0 to 5 years). The sites are likely to cater to local demand requirements and are of scale suitable for matching the needs of local businesses in the sub-area.

Richmond

The site assessed in Richmond is deemed to be suitable, available and achievable. It will only be achievable in the longer term however, due to transport capacity issues in Richmond. This is being investigated through a Richmond Transport Assessment.

The degree to which this site can meet future demand for B1/B2/B8 uses in comparison to the existing Gallowfields Industrial Estate is unclear. The potential land supply could offer an opportunity to provide a step-change in the quality of employment land provision in Richmond.

Scotch Corner

There is a substantial quantum of potential land supply at Scotch Corner. Sites, both individually and collectively, are of a scale that exceeds the current extant policy position in Core Strategy Policy SP5 and the forecast demand requirements.

The sites benefit from good access and connectivity to the A1 (M), and the upgraded junction. The sites assessed in this ELR are likely to cater to strategically significant, regional-scale B8 uses.

Should the sites assessed as part of the ELR progress through the Local Plan-making process and feature as employment land allocations, it would represent a fundamental shift in employment land provision in Richmondshire. The implications for other sites across the District, and the balance of overall provision across the District would be significant.

The role that the forthcoming Designer Outlet may play in stimulating further demand for employment land at Scotch Corner is currently unclear, and the Council will need to carefully consider how this would affect future decision-making on economic development policies and employment land allocations.

7.4 Key considerations for future policy

In matching supply and demand, a more specific, sub-area approach may ensure that the right balance of provision is secured in Richmondshire. In doing so, careful decision-making will be required to identify the right sites, in the right locations whilst also ensuring that there is not an over-allocation of employment land.

Catterick Garrison and Colburn appear well placed to benefit from the A1 (M) upgrades and the proposed expansion of the military personnel numbers resulting from the MOD's strategy. Sites at Colburn Business Park are amongst the most deliverable sites in the short term (0 to 5 years), and one of the few locations suitable for accommodating the potential growth for B1 space identified under the 'high growth' forecast scenario.

As noted, the sites assessed at Scotch Corner skew the overall scale of potential supply in the District. If the Council was minded to develop an economic strategy and employment land policy that allocated these sites, it would fundamentally alter the employment land portfolio in Richmondshire. This is not to say that possibilities at Scotch Corner should be ignored - the sites benefit from direct access to the A1(M) and could readily accommodate the forecast growth in B8 uses – but the implications and ramifications of taking such a stance will need to be thoroughly understood.

In considering the advantages and disadvantages of the potential land supply at Scotch Corner, the Council will also need to be mindful of the functional economic links to Darlington and Tees Valley. Any development proposals at Scotch Corner are likely to be strategically significant, and therefore serve a wider catchment area that includes the Tees Valley. Should sites at Scotch Corner be taken forward, the inter-relationship between these strategically significant, sub-regional employment sites, and those sites that are likely to only serve the local market, would need to be clearly explained in any subsequent policies prepared as part of the new Local Plan.

In terms of next steps, it is recognised that the evidence base used to prepare a new Local Plan is constantly evolving. As the Council progresses through the Local Plan-making process, it will need to reflect on, and react to, other evidence relating to the objectively assessed need for housing, infrastructure planning and delivery, and any new information relating to land ownership and availability. Similarly, in taking forward the analysis and conclusions from this ELR, the Council will need to reflect on the additional evidence that will emerge through the pending Retail and Leisure Study that the Council will commission.

In addition, when taking forward the analysis and conclusions from this ELR, the Council will also need to consider how the emerging Catterick Garrison Masterplan, and the imminent build-out of the Designer Outlet at Scotch Corner will affect employment land needs and locations for employment land allocations.

Based upon the analysis in this ELR, it is suggested that the policy wording set out in Core Strategy Policy SP5, Policy CP4, and Policy CP7 will require revision as part of the emerging new Local Plan. It is suggested that future policies for employment and economic development should be more specific, both in terms of identifying site allocations, and in terms of the criteria for safeguarding employment land, and promoting sustainable economic development.

Summary

- There is a mismatch between potential land supply and the forecast requirement;
- The sites assessed yield a potential land supply of 93 hectares, albeit only 23 hectares has been classified as suitable, available and achievable in the short term (0 to 5 years);
- This potential land supply figure is set against the estimated gross employment land requirement over the plan period in the range of -6.6 hectares to +6.1 hectares;
- The potential land supply is dominated by a number of large-scale sites. These large sites skew the overall total quantum of supply. They could also skew the locations for future employment land delivery and economic growth should they be formalised in policy and allocations;
- On the demand side, the main drivers of the District are expected to be Colburn, Catterick Garrison and the A1 corridor including Scotch Corner. Several key economic drivers and the policy focus of the LEP will support increased economic growth at these locations;
- In matching supply and demand, a more specific, sub-area approach may ensure that the right balance of provision is secured in Richmondshire;
- In doing so, careful decision-making will be required to identify the right sites, in the right locations whilst also ensuring that there is not an over-allocation of employment land;
- Catterick Garrison and Colburn appear well placed to benefit from the A1 (M) upgrades and the proposed expansion of the military personnel numbers resulting from the MOD's strategy;
- If the Council was minded to develop an economic strategy and employment land policy that allocated the sites assessed at Scotch Corner, it would

fundamentally alter the employment land portfolio in Richmondshire;

- Should sites at Scotch Corner be taken forward, the inter-relationship between these strategically significant, sub-regional employment sites, and those sites that are likely to only serve the local market, would need to be clearly explained in any subsequent policies prepared as part of the new Local Plan;
- It is suggested that the policy wording set out in Core Strategy Policy SP5, Policy CP4, and Policy CP7 will require revision as part of the emerging new Local Plan;
- It is suggested that future policies for employment and economic development should be more specific, both in terms of identifying site allocations, and in terms of the criteria for safeguarding employment land, and promoting sustainable economic development.

8 Conclusions

8.1 Overview

This section provides a summary of the overarching conclusions of the study.

8.2 The Richmondshire economy

BRES data indicates that total employment levels in Richmondshire were only slightly higher in 2015 than 2009 levels, growing by around 1.6% (+275 jobs). Three sectors experienced an absolute expansion in employment of 250 or more jobs over this period (i) Accommodation & food services (+625 jobs, +26%); (ii) Professional, scientific & technical (+425 jobs, +61%); and (iii) Retail (+250 jobs, +14%). The retail and accommodation & food services sectors accounted for the largest proportion of total employment in 2015 - together accounting for around 29%.

BRES data shows that the manufacturing sector contracted by 275 jobs (11%) over the period 2009-2015. Within the period however, a sharp contraction in 2012 to 2014 was followed by an expansion of around 5% in 2014 to 2015. The Annual Population Survey provides an alternative source of trend data. This shows that in the most recent period of expansion (2011 to 2017) employment has grown by the order of 5,400 jobs, an increase of 26.2%. There has been significant growth in the most recent years 2015-2017 that is yet to be fully reflected in the BRES data.

Leyburn (73.2%), Richmond (70.5%), Catterick Garrison and Colburn (66.3%) show higher levels of self-containment at the District level than other areas. Scotch Corner has a lower level of self-containment with only 47.0% of workers residing in the District.

The majority of businesses in the District are micro businesses with less than 10 employees. Richmondshire has a smaller proportion of medium to large businesses than the YNYER LEP area, Yorkshire and Humber region and nationally. The proportion of businesses in Richmondshire that are micro businesses has fallen over the period 2011-2017 – this could reflect growth in indigenous businesses in the District or greater numbers of larger firms moving in from outside.

There are three important future economic drivers of economic growth in Richmondshire that are pertinent at the time of this ELR: (i) Completion of the A1 upgrade; (ii) Expansion of Catterick Garrison; and (iii) Development of a Designer Retail Outlet at Scotch Corner. The MOD is projecting that an additional 4,900 military service personnel and dependents will be based in Catterick Garrison in the plan period to 2035. The A1 upgrade is nearing completion and is making the district more accessible to wider markets, supporting greater economic growth going forward. It is expected that a Designer Retail Outlet at Scotch Corner will open in late 2019/early 2020.

The local authority boundary provides a good guide to the FEMA for Richmondshire, acknowledging that there exists an overlap with other functional geographies in the peripheral areas of the District.

8.3 The property market

The A1 corridor is a focus for strategic investment by the LEP and RDC. The A1 upgrade is supporting further investment and economic activity along the corridor. It

is expected that the full economic benefits of improvements along the A1 Corridor will take a number of years to fully manifest. There is anecdotal evidence however that some impact is already being seen in terms of investor confidence and activity in the commercial property market.

Richmond fulfils an established role in providing for the business premises needs of smaller, higher value businesses in the town centre and larger businesses of a more diverse nature nearby on the Gallowfields Trading Estate. The historic characteristics of the area mean that its physically constrained however.

Catterick Garrison/Colburn does not have the physical constraints that Richmond has and offers good access to the A1. An important investment has been made in the A6136, providing a package of road junction improvements to improve traffic flow between the A1, Colburn and Catterick Garrison town centre. Significant property investment and development activity has also taken place in the area in recent years, enhancing retail and leisure opportunities.

The completion of the A1 upgrade is expected to contribute toward increased investor confidence in the market for employment premises along the A1 corridor. Colburn Business Park has a unique locational advantage and an established history of successful employment activity to capitalise on the improved market conditions. The future expected expansion of personnel numbers at Catterick Garrison is anticipated to generate a positive impact on the market. An increase in the population due to concentrated housing growth in the area will also increase the available workforce and custom. The full beneficial economic and market impacts of these catalysts is expected to occur over coming months and years.

Scotch Corner provides a distinct offer to that in other parts of the District. Its catchment is very different to the Catterick Garrison/Colburn area. The new Designer Outlet will be central in driving the development of this role in the future. Proximity to the A1 and widened A66 could increase the potential for Scotch Corner to attract B8/Distribution uses in the future. There could be potential to access the market for strategically significant, regional-scale B1/B8 uses. There are many other locations that are already well established in this market however.

AMR data shows that the greatest proportion of total B-class space delivered over the period 2014/15 to 2016/17 has been B1a (52%).

8.4 Site assessments

28 sites have been identified through the ELR. All sites are deemed suitable for employment purposes, and therefore the overall total potential supply equals 93 hectares (gross), and 67 hectares (net). Each broad location/settlement has some identified potential supply, and certain locations (e.g. Brompton on Swale, Colburn and Scotch Corner) have a significant potential supply of land.

The total potential supply is skewed by a small number of substantial sites (e.g. 6.4 hectares at Brompton on Swale, 6.46 hectares at Catterick Village, and 21 hectares and 12 hectares at Scotch Corner).

Whilst the overall scale of potential supply is substantial, not all sites are immediately available and achievable. This affects the scale of potential supply that is identified as being available and achievable in the short term (0 to 5 years), versus that which is more likely to be available and achievable over the medium term (6 to 10 years), and

longer term (11 to 15 years). Out of the 93 hectares (gross), only 15 hectares is considered to be deliverable in the short term.

Potential supply in Richmond is limited to one site. This may be due to the constrained historic nature of the town, and/or the effect of the relationship between the town centre and the Gallowfields Trading Estate. And so, whilst the identified potential site is suitable, available, and achievable, it will only be achievable in the longer term due to transport capacity issues in Richmond. This is being investigated through a Richmond Transport Assessment. RDC will need to reflect on whether this is a robust position given the role and function of Richmond, and its status in both extant and emerging policy.

Potential supply at Scotch Corner is substantial, and represents nearly half of the overall potential supply in the District (44 hectares out of 93 hectares – 47%). It should be noted that the supply figures for Scotch Corner include the site for the Designer Outlet. Nevertheless, even if this site was disregarded on the expectation that the Designer Outlet commences in the very near future – then the supply at Scotch Corner still represents 40% of the overall potential supply across the District.

8.5 Projected future need

The approach applied in the ELR is based on a combination of labour demand and supply forecasts, which are considered in the context of evidence on historic, market take-up. This enables both market conditions and the expected impacts of economic development policy to be taken into account.

The employment growth scenarios developed are based on the Regional Econometric Model (REM). These are trend based forecasts and do not include any planned public/private investments. The ELR utilises REM forecasts from both the latest March 2018 release and September 2016. The latter has been used as part of the 2017 SHMA analysis. There are significant differences between September 2016 and March 2018 projections from the REM. The ELR should plan for a range of scenarios. Reflecting this, a combination of the September 2016 and March 2018 releases are used to inform the employment growth scenarios tested.

There are three particularly significant catalysts for future employment growth in Richmondshire: (i) Completion of the A1 upgrade; (ii) Expansion of personnel numbers at Catterick Garrison; and (iii) Retail development at Scotch Corner.

In the low scenario, overall employment is projected to contract by a total of 410 jobs over the period from 2014 to 2035; this is equivalent to an annual average contraction of 20 jobs. In the medium scenario, overall employment is projected to expand by a total of 1,200 jobs over the period from 2014 to 2035; this is equivalent to an annual average growth rate of 57 jobs. In the high scenario, overall employment is projected to expand by a total of 2,288 jobs over the period from 2014 to 2035; this is equivalent to an annual average growth rate of 109 jobs.

It is important to acknowledge that the employment growth forecasts do not include:

- The known additional jobs growth anticipated in the retail sector at the Designer Retail Outlet due to be constructed at Scotch Corner; or
- Anticipated growth in MOD personnel numbers at Catterick Garrison.

These factors are not expected to directly impact on the forecasts for B-class uses.

Considering just the proportion of jobs that translate to B-class uses, only the high scenario generates an overall positive figure. The forecasts indicate an overall B-class employment change of between -922 to +423 jobs in the core B-class use categories over the period to 2035. This equates to an annual average change of between -44 and +20.

Overall, the results indicate a gross employment land requirement over the plan period in the range of -6.6 ha to +6.1 ha. This equates to an annual average of between -0.3 ha and +0.3 ha. Across the use classes, the greatest requirement is for B8 space. There is a positive B8 requirement across all three employment growth scenarios. For B1 space, there is a positive requirement only in the high scenario (+2.2 ha). The requirement for B2 space is negative across all three scenarios. This is largely driven by the projected decline of the manufacturing sector in the REM forecasts.

8.6 Balancing supply and demand

There is a mismatch between potential land supply and the forecast requirement. The sites assessed yield a potential land supply of 93 hectares, albeit only 15 hectares has been classified as suitable, available and achievable in the short term (0 to 5 years). This potential land supply figure is set against the estimated gross employment land requirement over the plan period in the range of -6.6 hectares to +6.1 hectares.

The potential land supply is dominated by a number of large-scale sites. These large sites skew the overall total quantum of supply. They could also skew the locations for future employment land delivery and economic growth should they be formalised in policy and allocations. On the demand side, the main drivers of the District are expected to be Colburn, Catterick Garrison and the A1 corridor including Scotch Corner. Several key economic drivers and the policy focus of the LEP will support increased economic growth at these locations.

In matching supply and demand, a more specific, sub-area approach may ensure that the right balance of provision is secured in Richmondshire. In doing so, careful decision-making will be required to identify the right sites, in the right locations whilst also ensuring that there is not an over-allocation of employment land.

Catterick Garrison and Colburn appear well placed to benefit from the A1 (M) upgrades, the proposed expansion of the military personnel numbers resulting from the MOD's strategy and increase in population arising from concentrated housing growth.

If the Council was minded to develop an economic strategy and employment land policy that allocated the sites assessed at Scotch Corner, it would fundamentally alter the employment land portfolio in Richmondshire. Should sites at Scotch Corner be taken forward, the inter-relationship between these strategically significant, sub-regional employment sites, and those sites that are likely to only serve the local market, would need to be clearly explained in any subsequent policies prepared as part of the new Local Plan.

It is suggested that the policy wording set out in Core Strategy Policy SP5, Policy CP4, and Policy CP7 will require revision as part of the emerging new Local Plan. Future policies for employment and economic development should be more specific, both in terms of identifying site allocations, and in terms of the criteria for safeguarding employment land, and promoting sustainable economic development.

Appendix 1 – Specific policies influencing aims for economic growth and employment land delivery (RDC Local Plan 2012-2028)

Policy	Summary of Key Points
<p>Spatial Principle 5- Scale and Distribution of Economic Development</p>	<p>Defines the scale and distribution of economic development across Richmondshire;</p> <p>Sets a delivery target of 12 hectares of land for employment development (excluding military needs) by 2028;</p> <p>Identifies that major employment development will be encouraged within the Colburn area;</p> <p>Development will be supported in the following areas that enable consolidation and improvement: Colburn; Gallowfields Estate, Richmond; Gatherley Road, Brompton on Swale; Harmby Road, Leyburn; and Stables around Middleham;</p> <p>Military development will be encouraged within the Catterick Garrison main sites and Marne Barracks;</p> <p>Appropriate town centre businesses and tourism uses and promotion of small scale development elsewhere to meet local employment needs;</p> <p>Complete loss of existing employment sites will be resisted where suitable alternatives do not exist;</p> <p>Appropriate opportunities related to the A1 will be considered (dependant on specific criteria).</p>
<p>Central Richmondshire Spatial Strategy (CRSS)</p>	<p>Support will be given to development that strengthen and sustains Richmond (considering its significant environmental and infrastructure constraints):</p> <p>Development that is sympathetic to employment at Gallowfields Trading Estate. This will promote an appropriate range of non-town centre uses; securing improvements in stock and condition of the existing site; encouraging reduced heavy goods vehicle movements; protecting and enhancing settings and views; and limits further expansion of land to the north east of Racecourse Road.</p> <p>Development that helps to create strategic growth of Catterick Garrison through employment development by:</p> <p>Encouraging existing vacant and previously developed sites in the built up area (south-east of Catterick Garrison first);</p> <p>Enhancing Hipswell, Scotton and Colburn;</p> <p>Protects and enhances green infrastructure;</p> <p>Incorporating low carbon and renewable energy design;</p> <p>Provides required improvements to A6136 (in line with infrastructure delivery plan);</p> <p>Accessibility for public transport and non-motorised users;</p> <p>Enhancing existing employment areas in Colburn;</p> <p>Supporting integration of military and non-military communities;</p> <p>Enables operation of existing or future military units at Catterick Garrison.</p> <p>Development in primary service villages of Brompton on Swale, Catterick Village and Scorton:</p> <p>Consolidating and enhancing Gatherley Road employment area for general industry and logistics (focusing on A1 and growth areas of plan, securing stock and condition of existing premises and infrastructure);</p> <p>Protects and enhances the provision of local facilities;</p> <p>Development is appropriate scale, location and design and is on existing vacant and previously developed sites</p> <p>Development will be considered at the new Catterick Central Junction</p> <p>Development outside the settlement hierarchy, which meets identified local needs in accordance with the Core Strategy.</p>

<p>Lower Wensleydale Spatial Strategy (LWSS)</p>	<p>Local Service Centre-Leyburn (including points relevant to employment): Support given to maintaining vitality and viability of the town centre through encouragement of businesses, environmental and infrastructure improvements; Scale and location of further employment development in the town will reflect its role in the sub area (including serving Yorkshire Dales National Park); Development should incorporate low carbon and renewable energy design integrating with existing and planned development (informed by Local Renewable and Low Carbon Energy Capacity Study); Preference for new development on existing vacant and previously developed sites in the built-up area; Support given to mixed use development Complete loss of employment sites will be resisted Primary Service Village- Middleham: Support to primary service role, however there is limited potential for additional development beyond existing built confines; Support given to developments and infrastructure to tourism and the horse racing industry. Secondary Service Villages (Harmby, Spennithorne, Finghall and Hunton): Small scale and limited development may be acceptable if they support social and economic needs and sustainability of the community. Within rural sub areas, sustainable development will be supported by in accordance with Spatial Principle SP3.</p>
<p>North Richmondshire Spatial Strategy (NRSS)</p>	<p>Growth will be modest and development will be small in scale In primary service villages of Middleton Tyas, Barton and Melsonby, support will be given for primary roles of these villages In secondary service villages of Newsham, Ravensworth, Dalton, Eppleby, Caldwell, Aldbrough, North Cowton and Gilling West- small scale and modest levels of development may be acceptable where it supports economic needs of the local community. Sustainable development in accordance with Spatial Principle SP3 will be supported. Priority will be given to development at upgraded A1 motorway junctions (e.g. Scotch Corner/ Barton Junction Service Area proposal/ appropriate motorway related development subject to policy SP5).</p>
<p>Core Policy CP4: Supporting Sites for Development</p>	<p>Development or activities that support and secure the sustainability of the settlement hierarchy (SP2) and Spatial Principle SP3 will be supported taking account of the following: Proposals should reflect and deliver - Strategy for the future of the area with a focus on scale and distribution of development (as defined within the Core Strategy); Responding to climate change (in accordance with CP2) and sustainable development (in accordance with CP3) and National Planning Policy (in relation to sustainable development); Location specific guidance within Sub Area Strategies and supplementary guidance; Providing social and economic needs of the local community; Proportionate to the existing settlement size and local service provision; The preferences of the local community (advanced through Neighbourhood Planning processes); Future planning policy documents including masterplans. The location of any development proposals should - Consistent with delivering development or revised local plan land availability policies Pending the delivery development plan or revisions to local plan, development</p>

	<p>proposals should be in or adjacent (if opportunities do not exist within) in line with Local Plan 1999-2006 Proposals Map or main built up confines where they do not exist;</p> <p>Development should be accessible and well related to existing facilities;</p> <p>Within capacity of existing infrastructure or it can be demonstrated that additional infrastructure will be provided.</p> <p>Development should be consistent with the requirements of the Core Strategy and should not -</p> <p>Impact adversely on character of the settlement or its setting, important open spaces and views, designated and undesignated heritage assets and the character of the landscape;</p> <p>Lead to the loss of/have an adverse impact on the deterioration of important nature conservation, water bodies or biodiversity/ geodiversity sites;</p> <p>Result in unacceptable loss of locally important open spaces or community facilities;</p> <p>Be located in areas of flood risk or would contribute to flood risk elsewhere;</p> <p>Cause significant adverse impact on amenity or highway safety.</p>
<p>Core Policy CP7: Promoting a Sustainable Economy</p>	<p>To develop and sustain the economy of Richmondshire (in accordance with SP5) support will be given:</p> <p>The development of employment activities that diversify the current offer in Richmondshire (especially provision of high quality jobs that enhance/ capitalise on the skills of the resident population);</p> <p>Development that promotes sustainable growth of key economic sectors (agriculture, food military, retail, tourism, leisure & equine);</p> <p>Development of digital, creative and cultural enterprises;</p> <p>Development of green, renewable and low carbon industries;</p> <p>Sustaining small and medium sized enterprises (and supporting new to grow);</p> <p>Provision of education and training facilities to develop skills base;</p> <p>Strengthen and enhance role and performance of Richmond, Catterick Garrison and Leyburn town centres to ensure vitality and viability;</p> <p>Safeguard unnecessary loss of valued facilities and services;</p> <p>Small scale rural development to meet local needs;</p> <p>Provision of high quality sites and premises suitable for B1 uses in Richmond, Catterick Garrison and Leyburn;</p> <p>Mixed use development of high quality layouts and design;</p> <p>Developing institutional and commercial links with Tees Valley and the North East;</p> <p>Infrastructure necessary to support economic development e.g. communications infrastructure, high speed broadband and transport investment.</p>
<p>Core Policy CP8: Achieving Rural Sustainability</p>	<p>Support will be given to social and economic needs of rural areas (beyond spatial principles of SP2) by encouraging:</p> <p>Expansion of rural businesses;</p> <p>Re-use of suitable rural buildings for employment (supporting SP3 and SP5);</p> <p>Provision of live-work units in smaller villages;</p> <p>Diversification of agricultural economy;</p> <p>Small scale renewable energy projects and businesses to serve the industry;</p> <p>Arts and crafts based industries;</p> <p>Technological developments to facilitate employment development in rural areas;</p> <p>Improve public transport services.</p> <p>Development will be supported where:</p> <p>For multiple enterprises with an essential requirement to locate in a smaller village or countryside;</p>

	<p>It will support the social and economic regeneration of economic areas; Re-use of existing rural buildings without substantial alteration, extension or reconstruction; Involve replacement buildings of a similar scale/ appropriate design to achieve more sustainable development. Development should respond to climate change and designed to be sustainable (in line with CP2 and CP3) and should not conflict with landscape character, amenity, environmental protection or nature conservation. Development should enhance the environment and provide necessary mitigation or compensatory measures to address harmful implications.</p>
<p>Core Policy CP9: Supporting Town and Local Centres</p>	<p>Retail Network and Hierarchy: Richmond Principal Town has an important retail, commercial and tourism role in serving the district but is limited by environmental and heritage constraints. Catterick Garrison Centre Principal Town has an important role in meeting the districts retail and leisure needs. The area offers significant opportunities for expansion in the provision of town centre uses. Leyburn Local Service Centre has an important role in supporting a large rural catchment including part of the Yorkshire Dales National Park, providing a wide range of retail and commercial uses, and had a strong independent retail offer. Support will be given to maintaining and enhancing the vitality and viability of town centre uses of Richmond, Catterick Garrison and Leyburn. Proposals involving the loss of retail uses (A1) within primary shopping frontages of the town centres will only be supported if they meet multiple criteria (more detail identified in policy); Support will be given for retail and town centre developments of more than 500m2 outside town centres dependent on multiple criteria (more detail identified in policy). Support will be given for proposals for small-scale retail development outside town centres where they meet multiple criteria (more detail identified in policy).</p>
<p>Core Policy CP10: Developing Tourism</p>	<p>Tourist related activities will be encouraged where they: Make a sustainable contribution to the local economy; Do not have a detrimental impact and enhance local environment and landscape; Priority will be given to supporting improvements to range and quality of facilities and redevelopment/ conversion instead of new buildings. Medium to large-scale hotel accommodation within larger settlements (Richmond, Catterick Garrison and Leyburn) will be supported where a need is identified and does not adversely affect character and appearance. New tourist accommodation in rural areas should be small scale, low key and low impact.</p>

Appendix 2 - Site Assessment Proforma

Subject Richmondshire Employment Land Review

Date 27 April 2018

Job No/Ref

259875-00

Richmondshire Employment Land Review Site Proforma

Site Information	
Site Name:	
Site Reference:	
Sub Area:	
Size:	
Developable Site Area:	
Address:	
Site Description:	
Status of employment use:	
Status of employment use:	
Suitability Criteria	
Physical Limitations	
PDL / Greenfield	
Access to the Site (including proximity to Strategic Road Network, presence of existing road infrastructure and ability to create a new access)	
Adjacent land uses (e.g. potential amenity issues)	
Flood Risk	

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Date 27 April 2018

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259875-00

Hazardous risks, pollution or contamination	
Infrastructure issues (e.g. power lines)	
Ground conditions	
Planning History	
Environmental and Heritage	
Ecology (e.g. wildlife sites)	
Heritage (Listed Buildings, Scheduled Ancient Monuments or Conservation Areas):	
Summary of Suitability	
Availability	
Is the site considered to be available	
Achievability	
Is the site considered achievable?	
Summary of commercial and market attractiveness of the site	
Deliverability	
Is the site deliverable?	