



Background Paper: Interim Employment Land Review

October 2017

Executive Summary

This interim Employment Land Review (ELR) shows how Fareham can meet its required economic development floorspace requirements for the plan period up to 2036.

It follows a three stage approach which was previously advocated within the former ODPM Employment Land Reviews: Guidance Note (2004), of looking firstly at the existing stock of employment sites, then looking at what the future floorspace requirements of the Borough are, before analysing all potential sites and showing how, on a number of recommended sites, the requirements can be met.

This interim ELR firstly sets the scene by providing a broad economic profile for the Borough against sub-regional, regional and national economic trends. It then lists out all of the Borough's existing employment sites that are considered suitable for retention and those no longer recommended to be protected for employment uses. These sites are listed in Tables 5 and 6 with maps for each of these sites included within the supporting appendix.

The future requirements for the Borough for the plan period are derived from work undertaken by Partnership for Urban South Hampshire (PUSH) in the South Hampshire Strategy.

An analysis of potential sites in the Borough (detailed in Section 5 with maps for each of these potential sites as set out in Table 9 provided within the supporting appendix) shows that Fareham has the potential to meet its overall requirements by some 41.9%. However, whilst there appears to be an oversupply of industrial/warehouse floorspace there is a deficit in terms of overall office supply.

In addition to those existing employment sites that will be retained, this interim ELR concludes that there is a need to allocate the following additional sites for employment use to help meet the Borough's requirements:

- Faraday Business Park, Daedalus – Extension and Intensification
- Swordfish Business Park, Daedalus – Extension and Intensification
- Solent 2, Whiteley
- Midpoint 27, Cartwright Drive
- The Walled Garden, Cams Hall
- Land at Standard Way, Wallington (extension of North Wallington Business Park)

This ELR has been published as supporting evidence alongside the Draft Local Plan and will be reviewed accordingly in the lead up to the submission draft of the Local Plan. A further review of the ELR will subsequently be based upon further emerging information and evidence that is made available to the Council.

Contents Page

Section 1: Introduction	4
The need for an Employment Land Review – Policy Context	4
National Planning Policy Framework (NPPF)	4
Planning Practice Guidance (PPG)	5
Building Our Industrial Strategy: Green Paper (2017)	5
Permitted Development Rights	6
Solent Strategic Regional Economic Plan 2014-2020	6
PUSH Spatial Position Statement (2016)	7
Local Planning Policy	7
How Will the Employment Land Review be used?	7
Section 2: Methodology	8
Retaining the three stage approach	8
Stage 1 – Taking stock of the existing situation	8
Stage 2 – Creating a picture of future requirements	8
Stage 3 – Meeting future requirements	8
Non-B Use Classes	9
Section 3: Stage 1 – Taking stock of the existing situation	10
National characteristics	10
Regional characteristics	10
Sub-regional characteristics	11
Borough characteristics	13
Review of existing Employment Sites	21
Section 4: - Stage 2 – Creating a Picture of Future Requirements	29
PUSH South Hampshire Strategy – Employment Land Requirements	29
Market Needs and Requirements	29
Section 5: Stage 3 – Meeting Future Requirements	30
Completions & Losses	30
Sites with Permission	30
Vacancies – Industrial and Office	31
Potential Sites Considered for Allocation	31
Meeting Floorspace Requirements	37
Section 6: Analysis of Key Sites	40
Daedalus (Solent Enterprise Zone)	41
Solent 2, Whiteley	42
Midpoint 27, Cartwright Drive	42
Fareham Town Centre Sites	43
Other Centres in the Borough	44
Other Potential Sites Considered for Allocation	45

List of Figures

Figure 1: Labour Productivity by NUT1 region or country, 2015	11
Figure 2: GVA Per Hour Worked – highest ranking UK NUTS2 sub-regions 2015	12
Figure 3: Economic Activity and GVA Added Per Head – Hampshire Local Authorities	13
Figure 4: Earnings by Place of Residence (2011-2016)	14
Figure 5: Qualification Levels (Jan 2016 – Dec 2016)	15
Figure 6: All People – Economically Active – Hampshire – Unemployed	16
Figure 7: Distance Travelled to Work	17

List of Tables

Table 1: Methods of travelling to work (2011 Census)	17
Table 2: No. of Commuters in and out of Fareham Borough	18
Table 3: Jobs by Industry	19
Table 4: Business Size	21
Table 5: Existing Employment Sites to be retained	23
Table 6: Sites not recommended for protection	27
Table 7: Fareham Borough Employment Floorspace Need 2011-2036 by B Class Employment Type	29
Table 8: Sites with Permitted Floorspace Availability	31
Table 9: Potential Sites Considered for Allocation	33
Table 10: Employment Floorspace Supply 2011-2036	38
Table 11: Potential Sites Recommended for Allocation	40

Appendix

Existing Employment Sites to be retained
 Sites not recommended for protection
 Potential sites considered suitable for allocation

Section 1: Introduction

- 1.1 The purpose of this interim Employment Land Review (ELR) is to provide valuable evidence in support of the Draft Local Plan 2036 by providing a review of all the land that is currently, or can potentially be, used for employment. For the purposes of this study, and to accord with the work on employment land requirements undertaken by the Partnership for Urban South Hampshire (PUSH), employment floorspace is classified as the following:
- Offices (B1)
 - Manufacturing (B2) & Distribution (B8)
- 1.2 In addition to reviewing the existing supply of employment sites across the Borough, this document will also include a range of economic information to explain the Borough's economic characteristics. It will then set out the requirements for new employment floorspace as well as looking at sites that have the potential to help meet this requirement. It is important to note that this document will be updated prior to the Regulation 19 submission draft of the Local Plan. This will draw upon additional information and evidence which will be used for further reviewing the sites to be retained and the allocations that have been recommended for employment provision at this Regulation 18 Draft Local Plan stage.

The Need for an Employment Land Review – Policy Context

- 1.3 This sub-section explains the current and emerging national, sub-regional and local policy position with regards to providing an adequate supply of employment land for meeting business needs.

National Planning Policy Framework (NPPF)

- 1.4 The National Planning Policy Framework (NPPF) requires that Local Plans are based upon a robust and up to date evidence base. This interim ELR has been prepared in accordance with the principles of the NPPF and provides part of the Local Plan evidence base for employment land matters.
- 1.5 The importance of building a strong, competitive economy is one of the key drivers of the NPPF. It specifically states that land allocations for employment use 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 and that 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.
- 1.6 The NPPF also states that "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". It goes on to say that LPA's should assess the needs for land or floorspace for economic development, and assess the existing and future supply of land required to meet the identified needs.

Planning Practice Guidance (PPG)

- 1.7 On 6th March 2014 the Government published new national Planning Practice Guidance (PPG) which includes sub-sections on 'Housing and Economic Development Needs Assessments' and 'Housing and Economic Land Availability Assessments'. This guidance replaces the ODPM Employment Land Reviews: Guidance Note (2004).
- 1.8 In economic development terms 'need' relates to the amount of economic development floorspace required based on quantitative assessment and an understanding of the qualitative requirements of market segments. The PPG requires assessments to be based on an objective analysis of the facts and should not be biased or influenced by constraints to the overall assessment or limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints. Although it is recognised that such evidence will need to be addressed when identifying specific policies within development plans.
- 1.9 It is further recognised that there is no one methodological approach for the assessment of need. However, the PPG advises that in understanding the current market in relation to economic uses plan makers should liaise closely with the business community to understand their current and potential future requirements.
- 1.10 The assessment of land availability is an important step in the preparation of Local Plans whereby an assessment should:
- Identify sites and broad locations with potential for development
 - Assess their development potential
 - Assess their suitability for development and the likelihood of development coming forward (the availability and achievability).
- 1.11 This ELR has been prepared by according with the above principles from the PPG with regards to the assessment of land availability¹. Although no longer extant, the general principles of the ODPM Employment Land Review: Guidance Note which sets out a three stage framework to developing an Employment Land Review are considered to remain both robust and relevant and is pertinent in the structure of this document.

Building Our Industrial Strategy: Green Paper (2017)

- 1.12 The Government is committed to building an industrial strategy that addresses the long-term challenges to the UK economy. This includes addressing the opportunities and challenges presented by the UK vote to leave the European Union. The Government's objective is to improve living standards and economic growth by increasing productivity and driving growth across the whole country. The Green Paper sets out an objective "to improve living standards and economic growth by increasing productivity and driving growth across the whole country".
- 1.13 The evidence underpinning this interim ELR will help towards ensuring the Council meets the objectives of the Government's industrial strategy by demonstrating how and where the Borough's economic development needs can be addressed.

¹ Work on assessment employment land requirements has been undertaken separately by the Partnership for Urban South Hampshire (PUSH) and has subsequently informed the employment floorspace requirements for Fareham Borough.

Permitted Development Rights

- 1.14 A number of changes have been made to permitted development rights in recent years. These changes have been made through subsequent amendments to the Town and Country Planning (General Permitted Development) (England) Order. The following changes have been made which are relevant for B1-8 employment uses:
- From B8 storage and distribution to C3 (residential) during a 3 year period up to 15 April 2018 (Part 3 Class P) through the prior approval process and limited to 500 sq.m.
 - B1(a) offices to C3 (residential) (Use Class O) for developments assessed against the post 6-April 2016 amendments to the GDPO with the change of use requiring completion within 3 years starting with the prior approval date (this change was confirmed as permanent through the Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016).
 - From uses including B2 to a state school or registered nursery (Part 3 Class T) through the prior approval process.
 - From B1(c) light industrial to C3 (residential) subject to limitations and conditions including the prior approval of the local planning authority in respect of certain matters.
From any A Class, B1 or D Class Use to a temporary flexible use (including A1, A2, A3 and B1) for a single continuous period of up to two years (Part 4 Class D), limited to 150 sq'm.
- 1.15 The GDPO includes an exemption which applies to areas within 17 local authorities, but the announcement has confirmed that this exemption will expire in May 2019. The onus is now placed on local authorities to consider making Article 4 Directions that exempt parts of their areas from permitted development rights. No such exemptions are in force in Fareham Borough.

Solent Strategic Regional Economic Plan 2014-2020

- 1.16 The vision for the Solent as set out in the initial growth strategy, A Strategy for Growth (2012) states:
- “Our vision is to create an environment that will bring about sustainable economic growth and private sector investment in the Solent. It will assist this globally-competitive area reach its full potential, enabling existing businesses to grow, become more profitable and to be greener; enabling the creation of new businesses and attracting new businesses to the region.”*
- 1.17 The LEP's Strategic Economic Plan (SEP) identifies six priority areas of work which will advance the Solent's economy. These constitute:
- Supporting new businesses, enterprise and ensuring SME survival and growth.
 - Establishing infrastructure priorities including land assets, transport and housing, reducing flood risk and improving access to superfast broadband.
 - Establishing a single inward investment model to encourage companies to open new sites in the region, supported by effective marketing.
 - Investing in skills to establish a sustainable pattern of growth, ensuring local residents are equipped to take up the jobs that are created and businesses can

source local skills and labour to underpin growth.

- Developing strategic sectors and clusters (interconnected groups and businesses) of marine, aerospace and defence, advanced manufacturing, engineering, transport and logistics businesses, low carbon and the visitor economy – establishing the area as a business gateway, at both local and international levels and developing local supply chains.
- Building on our substantial knowledge assets to support innovation and build innovative capacity in the Solent area to stimulate growth in Solent businesses and in new high growth sectors, particularly linked to our higher education (HE) excellence.

PUSH Spatial Position Statement (2016)

- 1.18 In line with the NPPF requirements to work in tandem with neighbouring authorities, the evidence that underpins this interim ELR has been undertaken by the Partnership for Urban South Hampshire (PUSH). This work involved discussion and input from all Local Authorities in the PUSH sub-region cumulating in the publication of the PUSH Position Statement (June 2016). This includes a requirement for almost 1,000,000 sq.m of B1-8 floorspace to be developed across the sub-region between 2011 and 2034 with a further breakdown showing this will consist of 509,000 sq.m of office floorspace and 462,000 sq.m of mixed B-Class floorspace. Each Local Authority is expected to contribute towards this target. Fareham Borough has an allocated target of 55,000 sq.m of offices and 64,000 sq.m of manufacturing and distribution up to 2034. This interim ELR will show how Fareham will address this target in its Draft Local Plan².

Local Planning Policy

- 1.19 The new Local Plan will influence the supply of employment land for the period up to 2036 and is being prepared to accord with the NPPF and PPG. The employment floorspace requirements within the Council's Development Plan are currently set out in the Local Plan Part 1: Core Strategy (2011), Part 2: Development Sites and Policies (2015) and Part 3: The Welborne Plan (2015). The employment floorspace requirement figures for both Welborne and for the rest of the Borough have subsequently been revised in response to the employment floorspace targets published by PUSH and the latest evidence.

How will the Employment Land Review be used?

- 1.20 The interim ELR will be used to show how the floorspace targets derived from the work undertaken by the Partnership for Urban South Hampshire can be met within the Borough. The recommendations in this interim ELR will also be used to inform the Draft Local Plan.

² It is important to note that the apportionment figure for the Borough has been increased by an additional 2 years (at the PUSH Spatial Position Statement rate of 5,174sq,m per annum) in order to plan for 2036.

Section 2: Methodology

Retaining the three stage approach

- 2.1 As referred to in Section 1, the principles of the Office for Deputy Prime Minister (ODPM) "Employment Land Reviews: Guidance Note (2004)" is considered to remain both robust and relevant. In the absence of a set methodology on how to undertake an assessment of economic development needs and economic land availability assessments, it has been used alongside the NPPF and PPG to inform the structure and content of this document.

Stage 1 – Taking stock of the existing situation

- 2.2 The objectives of stage 1 are to identify the best employment sites to be protected and those to be released. This has been achieved at this interim stage through a broad review of all existing sites used for B Class employment uses which are either at least 0.25 ha in size or accommodate at least 500 sq.m of employment floorspace.
- 2.3 Stage 1 should also describe the local economic profile with a review of the Borough's characteristics as well as a review of characteristics of the wider region/sub-region. This review of the characteristics informs the "functional property market" by looking at travel to work areas, sub-regional and local markets as well as the place of the Borough within the region.

Stage 2 – Creating a picture of future requirements

- 2.4 Part of the purpose of Stage 2 guidance is to create a forecast of the future requirements for employment floorspace within the Borough. Fareham Borough Council worked with PUSH and its member Local Authorities to produce the apportionment figures for employment floorspace within the Spatial Position Statement (PUSH June 2016).
- 2.5 In line with all the work from PUSH this interim ELR splits the targets by type of employment floorspace, thus producing different tables for offices (B1) and manufacturing and distribution (B2 & B8).
- 2.6 The remaining part of Stage 2 assesses future needs of key sectors of the Fareham economy. Information relating to business needs and market trends will inform the next update of this ELR that will be published in the lead up to Regulation 19 submission draft of the Local Plan.

Stage 3 – Meeting future requirements

- 2.7 Stage 3 looks at potential options for meeting the requirements for new employment floorspace. This has been done by assessing all potential employment sites, including sites with the potential to expand or intensify existing uses. Sites allocated for employment in the Local Plan Part 2: Development Sites and Policies (2015) but not yet complete will be reviewed alongside other potential sites and will not simply be rolled forward as retained allocations in the Draft Local Plan 2011-2036. This is in line with the NPPF that states "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."

- 2.8 Planning permissions and net completions since the start of the forthcoming Draft Local Plan period (2011) are also factored into meeting the employment land requirements set by PUSH, in terms of meeting supply.
- 2.9 This review of potential sites is set in the context of the requirements set out in Stage 2, with Table 9 showing how the future requirements can be met if all identified sites were allocated for employment use.
- 2.10 Section 6 looks in further detail at the key sites influencing the supply position. Table 10 discounts a number of the potential sites identified in Stage 2 (Table 9). An additional write up is also included in this section which provides a steer on those sites recommended for inclusion or exclusion from the supply.

Non-B Use Classes

- 2.11 Fareham Borough Council acknowledges that non-B use class jobs play an important role in the economic profile of the Borough. However, the PUSH work that forms the foundation of the requirements for future employment floorspace looks solely at the B use classes. Therefore this interim ELR has no basis for assessing specific future requirements for non-B uses at this point in time. In line with the NPPF, it is considered that taking a flexible approach to existing employment sites, to allow for alternative forms of economic development would be appropriate. Allowing for changes of use from B uses to non-B uses should be considered acceptable where the former use is no longer considered viable, and where the new proposal would create similar job numbers. The Council's position on allowing for non-B use development will be clarified in the Draft Local Plan 2011-2036.

Section 3: Stage 1 - Taking stock of the existing situation

- 3.1 This section provides an overview of the existing employment and economic development situation of the Borough. This is achieved by two methods. Firstly by reviewing the contextual characteristics of not only Fareham but the sub-region and the South East region as a whole. Secondly by reviewing all existing employment sites with the Borough and making recommendations over their suitability for continued employment use.

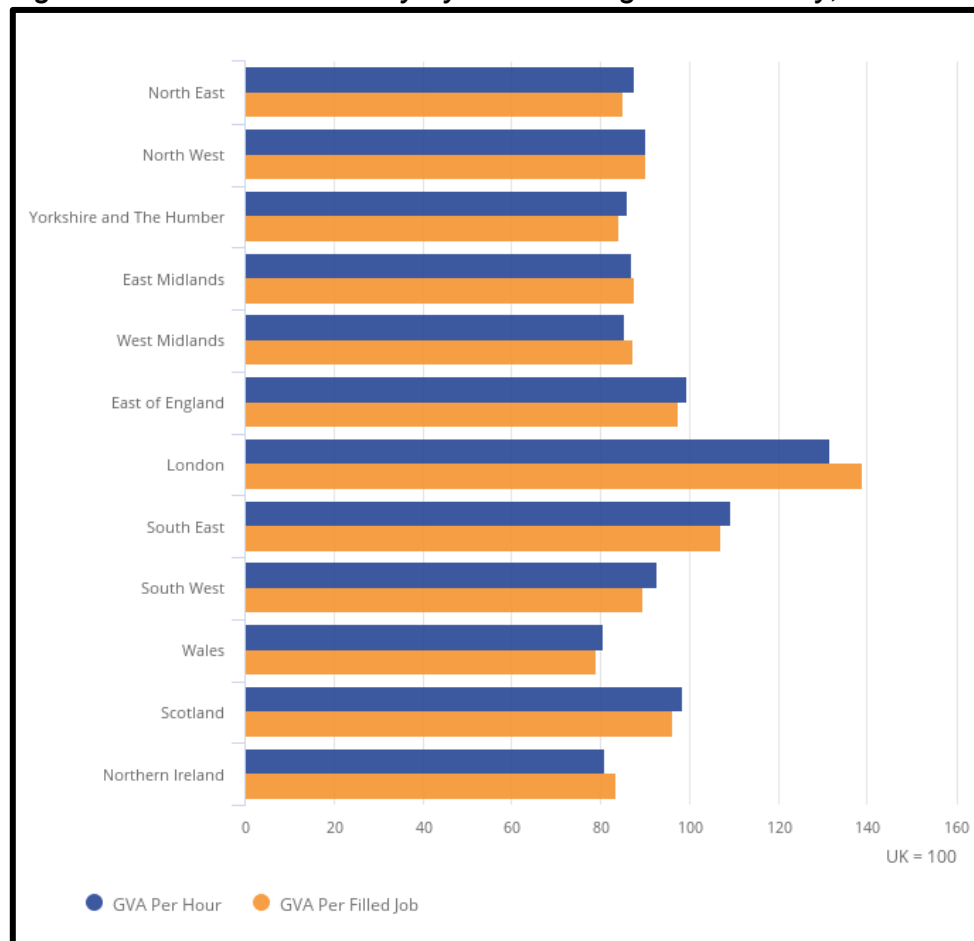
National characteristics

- 3.2 The UK is the fifth largest national economy in the world after the USA, China, Japan and Germany when measured by nominal gross domestic product (GDP). It is dominated by the service sector, mainly constituting banking, insurance and business services, contributing to around 80% of overall GDP. However, the UK maintains industrial capacity in high-tech and other sectors. The country's manufacturing base has experienced a long-term decline in importance but still accounts for 10% of overall economic output.
- 3.3 The economy has mostly recovered following the financial crash in 2008 with unemployment levels currently at historic lows. GDP continues to increase annually although GDP growth has slowed during 2017. Public debt and borrowing are also at particularly high levels whilst inflation currently outstrips wage growth.
- 3.4 This interim ELR post-dates the UK vote to leave the European Union in June 2016. Whilst the vote to leave may present new opportunities for the economy, there are current uncertainties regarding the UK's future relationship with the EU with regards to future trading arrangements and how this could influence the longer term national economic outlook. The economic implications of the UK's future trading relationship with the EU will be particularly influential on longer-term national economic growth which will filter through to the sub-regional and local economy.

Regional characteristics

- 3.5 The South East region as a whole is one of the most economically successful areas of the country, coming second behind London in terms of its calculated GVA per Hour and GVA filled per job (see Figure 1 below).

Figure 1: Labour Productivity by NUTS 1 region or country, 2015

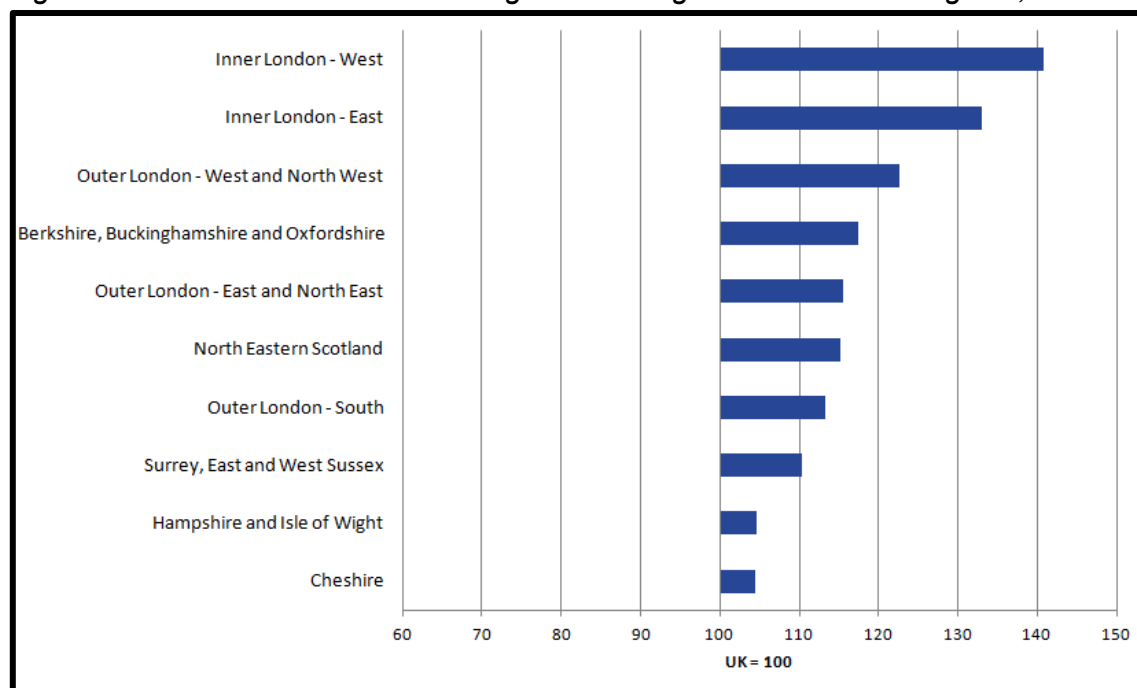


Source: ONS 2017

Sub-regional characteristics

- 3.6 Fareham is located within the Hampshire and Isle of Wight sub-region. The Hampshire and Isle of Wight sub-region is amongst the highest ranked sub-regions within the UK in terms of GVA per hour worked. However, Figure 2 shows the GVA per hours worked in Hampshire and the Isle of Wight to fall below the South East sub-regions of Berkshire, Buckinghamshire and Oxfordshire and Surrey, East and West Sussex.

Figure 2: GVA Per Hour Worked – highest ranking UK NUTS2 sub-regions, 2015



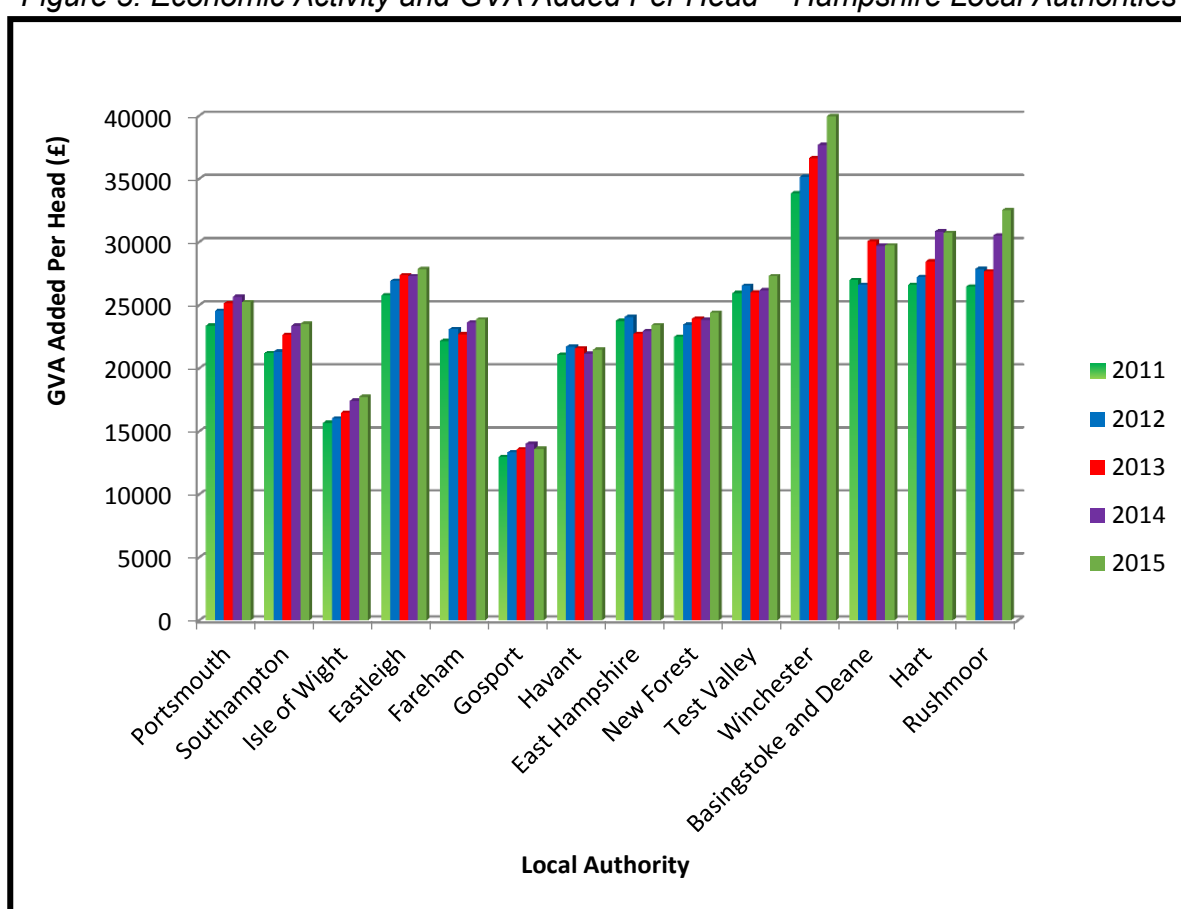
Source: ONS (January 2017)

- 3.7 The South Hampshire sub-region is dominated by the port cities of Portsmouth and Southampton. The M27 motorway connects the two cities and runs through the north of Fareham Borough, providing existing and potential businesses with easy access to both cities international ports, Southampton Airport and the M3 motorway and A3(M) which run directly to London.
- 3.8 The “Future of the M27 Corridor” (Savills 2017) publication notes that commercial investment is returning to levels last seen during 2007 prior to the financial crash, particularly in the office and industrial markets with the economy of the M27 corridor and surrounds growing faster than the national average. However, there is a shortage of new sites available within both the industrial and office sectors to meet demand, particularly within proximity to the M27 corridor. It is therefore important that more space is delivered within the area to prevent a hampering of demand.
- 3.9 The Borough is argued to form part of the South Hampshire Functional Economic Area (FEMA). This should be defined by its travel to work areas (TTWA), housing market area (HMA), administrative areas and the location within the area covered by the Solent Local Economic Partnership (LEP). The PUSH Strategic Housing Market Assessment (SHMA) (January 2014) defines the western part of the Borough alongside Eastleigh Borough, the city of Southampton, part of the New Forest District, part of Test Valley District and part of Winchester District. The PUSH SHMA defines the eastern part of the Borough alongside part of Winchester District, Gosport Borough, the city of Portsmouth, Havant Borough and part of East Hampshire District. The principal TTWAs for Fareham residents as shown in Table 2 further in this section include Portsmouth, Southampton, Winchester, Gosport, Test Valley and New Forest. The Solent LEP covers much of south Hampshire of which Fareham is a member. It can therefore be concluded that Fareham Borough falls within the South Hampshire FEMA.

Borough characteristics

- 3.10 ONS population estimates for the Borough show a recorded population of 115,400³ in 2016 of which 53% of the overall population are classed as economically active. The proportion of the Borough's economically active residents aged between 16 and 64 in work (81%) is above that in Hampshire (80.5%) and the South East (77.7%) (NOMIS Official Labour Market Statistics April 2016-March 2017).
- 3.11 Figure 3 shows GVA added per head in Fareham in comparison to other Hampshire Local Authorities. Over the five year period from 2011, GVA added per head is comparable with that of Southampton, East Hampshire and New Forest. However, it is lower than Local Authority areas which include Portsmouth, Eastleigh, Test Valley, Winchester, Basingstoke and Deane, Hart and Rushmoor.

Figure 3: Economic Activity and GVA Added Per Head – Hampshire Local Authorities



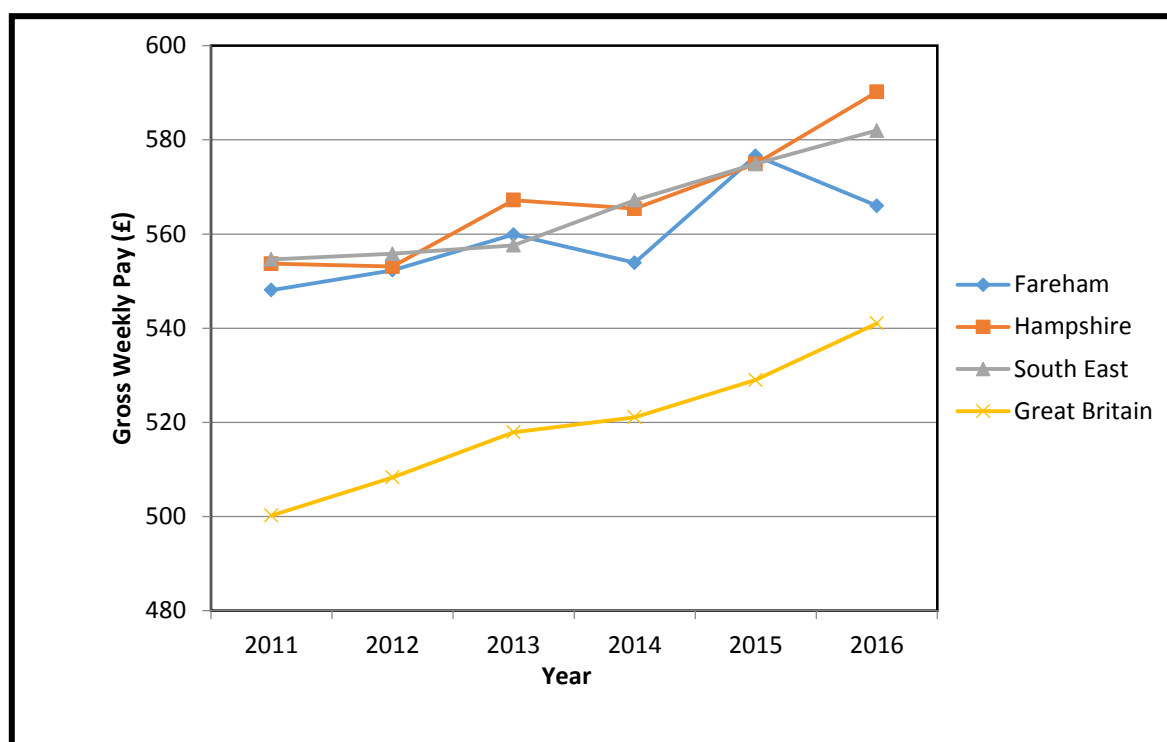
Source: ONS (March 2017)

Earnings

- 3.12 Fareham fares better in Figure 4 which shows the earnings by residence in comparison to Hampshire, the South East and Great Britain. Earnings by residence in Fareham were generally comparable with those in Hampshire and the South East over the period between 2011 and 2016 and well above those at the national level.

³ ONS population estimates 2016 should be considered alongside other population estimates for the Borough including Hampshire County Council's Small Area Population Forecasts.

Figure 4: Earnings by Place of Residence (2011-2016)



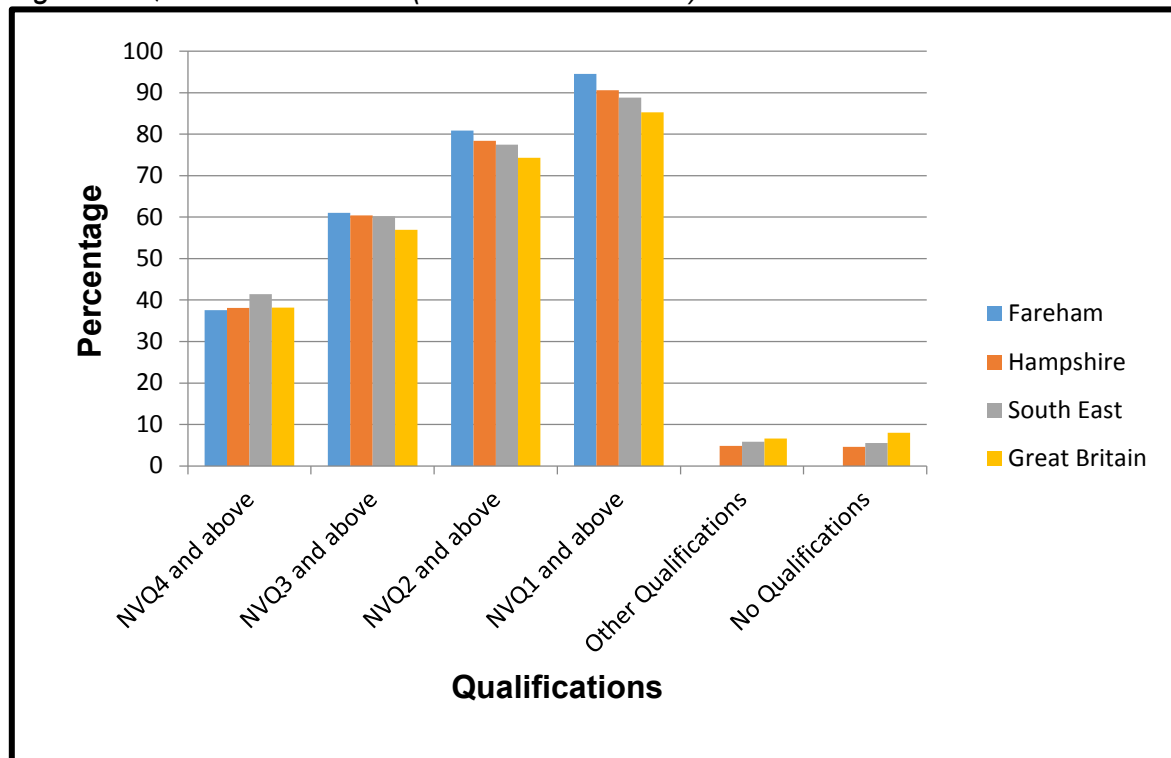
Source: ONS annual survey of hours and earnings – resident analysis

Notes: Median earnings in pounds for employees living in the area

Qualification Levels

- 3.13 Figure 5 shows that 61% of the Borough's economically active residents are educated up to NVQ3 and above with 37.6% educated up to NVQ4 and above. This is indicative of a relatively skilled workforce that resides within the Borough. The levels attained up to at least NVQ3 by Fareham residents is higher than the proportion attaining qualifications at this level at the county, regional and national level. The higher level of qualifications attained by the Borough's residents is partly reflected in the economic activity rates as set out in paragraph 3.10 and the unemployment rates shown in Figure 6.

Figure 5: Qualification Levels (Jan 2016-Dec 2016)



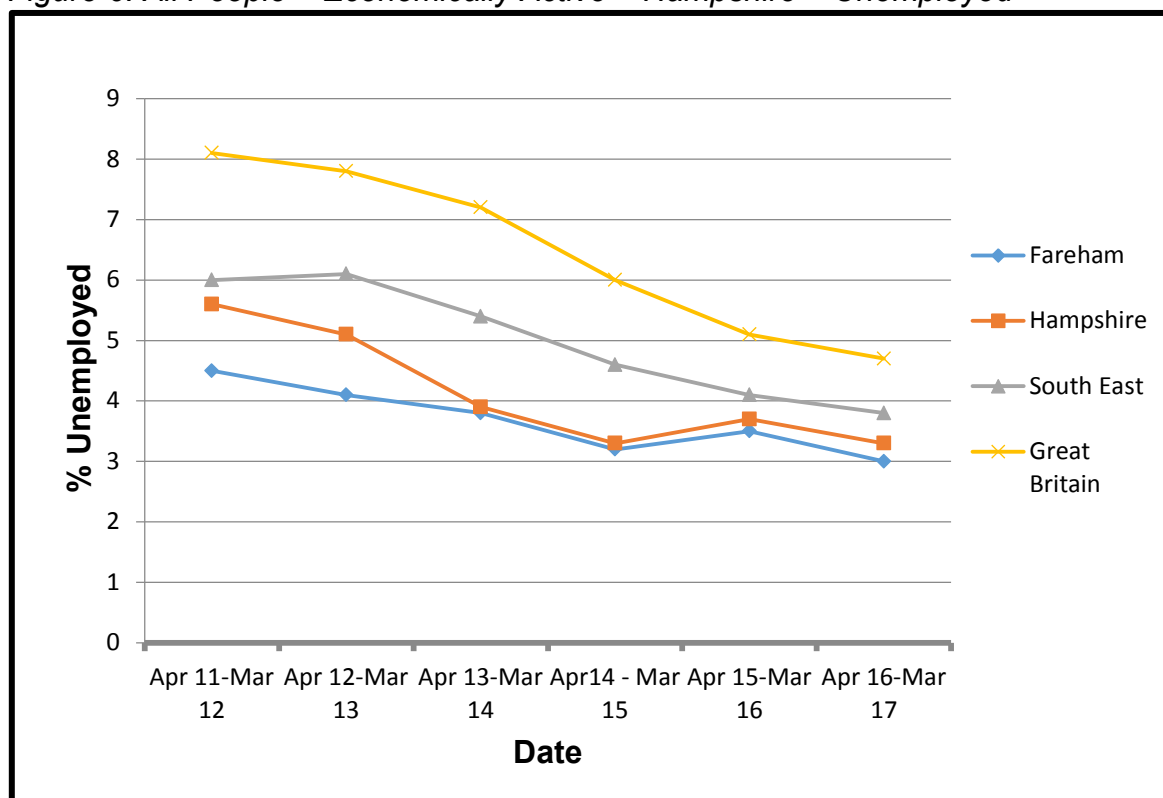
Source: ONS Annual Population Survey (2017)

Notes: Sample size too small for an estimate where no data provided

Unemployment

- 3.14 Unemployment continues to fall to historically low levels in line with national trends. It is notable that the unemployment rate in Fareham is lower than that recorded within Hampshire, South East and Great Britain as shown in Figure 6. This can be partly attributed a higher than average proportion of skilled workers that reside within the Borough and other parts of the sub-region.

Figure 6: All People – Economically Active – Hampshire – Unemployed



Source: ONS Annual Population Survey (2017)

Commuting Patterns

- 3.15 Table 1 shows that 46.7% of the population in Fareham Borough travel to work by driving a car or van. This is well above the national average of around 35%. 1.3% take the bus, compared to the national average of 4.7%, and although over 4.5% of people in Fareham walk to work this is also below the national average of over 6%. The amount of people who work from home in the Borough is slightly above the national average, although this proportion has doubled (in a national trend) since the 2001 Census. The trend for increased working from home is likely to continue due to the benefits this can bring such as reduced commuting costs, increased availability of superfast broadband, flexible working patterns and a healthy work life balance.

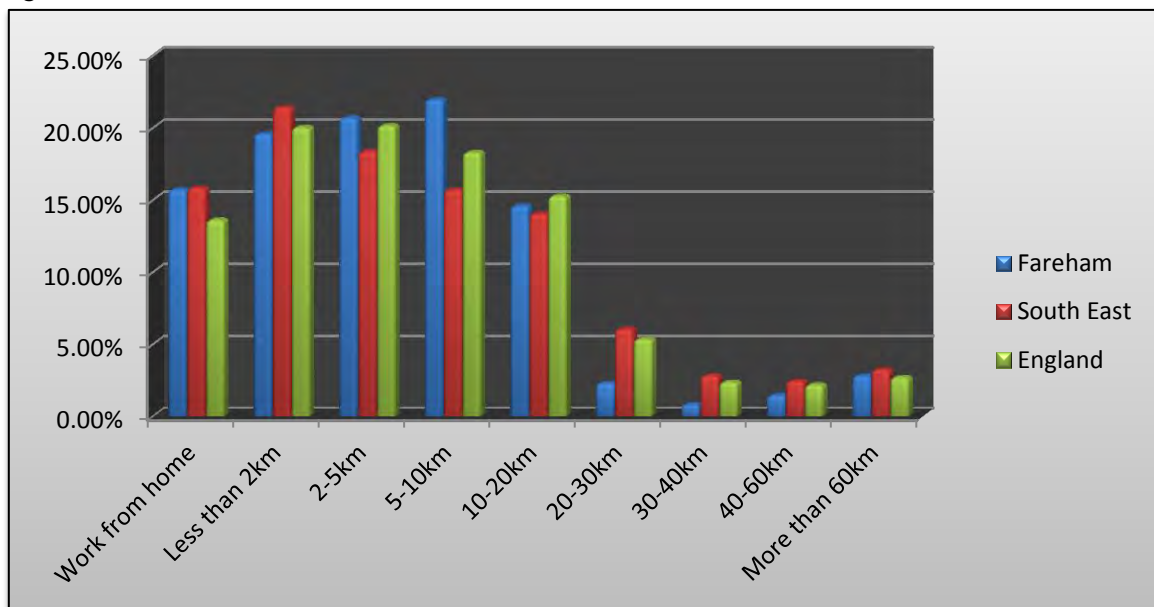
Table 1: Methods of travelling to work (2011 Census)

	Fareham	South East	England
Works mainly from home	7.1%	8.3%	6.9%
Underground, metro, light rail or tram	0.1%	0.2%	2.6%
Train	2.5%	4.8%	3.3%
Bus, minibus or coach	1.3%	3.0%	4.7%
Taxi or minicab	0.2%	0.2%	0.3%
Driving a car or van	46.7%	38.9%	34.8%
Passenger in car or van	3.2%	3.1%	3.2%
Motorcycle, scooter or moped	0.9%	0.6%	0.5%
Bicycle	2.5%	2.0%	1.8%
On foot	4.5%	6.6%	6.3%
Other	0.6%	0.3%	0.3%
Not in Employment	30.5%	32.1%	35.3%

Source: ONS

- 3.16 Figure 7 shows the distances travelled by workers in Fareham, compared to that of workers in the South East and England as a whole. The chart generally shows Fareham has a higher proportion of workers who travel under 10km and a lower proportion that travel over 30km for work compared to the regional and national averages.

Figure 7: Distance Travelled to Work



Source: ONS

- 3.17 The reasons for this variation from the national average in the distances travelled by workers in Fareham become apparent when looking at Table 2 which shows the major commuting flows to and from the Borough. The majority of popular working destinations fall within the 2-20km brackets.
- 3.18 28,977 workers are recorded as living and working within the Borough, almost 4,000 more than in 2001 (2011 Census). In addition to that, Table 2 shows that 27,355 workers commute into the Borough (6,000 more than in 2001), with Gosport easily being the biggest provider of employees although Portsmouth, Southampton, Havant and Winchester all provide significant numbers of workers as well. 31,037 residents of the Borough work in other locations, meaning an overall net outflow of 3,682 people, with the most popular employment locations being Portsmouth, Southampton, Winchester, Gosport, Test Valley and New Forest.

Table 2: No. of Commuters in and out of Fareham Borough

	In	Out	Difference
Gosport	8,034	3,362	4,672
Portsmouth	4,795	8,660	-3,865
Southampton	4,403	5,499	-1,096
Winchester	3,776	2,669	1,107
Havant	2,112	583	1,529
Eastleigh	920	552	368
Test Valley	888	1,999	-1,111
New Forest	391	1,242	-851
Isle of Wight	158	982	-824
Rest of Hampshire	666	496	170
Other	1,212	4,993	-3,781
Total	27,355	31,037	-3,682

Source: ONS

Employment Types in Fareham

- 3.19 The concentration of all B Class employment uses is mostly in the more northern part of the Borough within proximity to motorway junctions 9, 10 and 11 and existing railway stations (i.e. Fareham and Swanwick). Park Gate, Segensworth, Fareham Town Centre and surrounding area and north Fareham represent the highest areas of B1 concentration. B2 and B8 are generally more evenly spread around the Borough.
- 3.20 The more rural southern parts are mainly absent of employment opportunities. However, new employment allocations at Daedalus (i.e. the Swordfish and Faraday Business Parks in Daedalus) will further influence the concentration of employment uses particularly within the south of the Borough in future.

Jobs by Industry

- 3.21 Table 3 shows that Fareham has nearly double the national average of workers employed in Public Administration and Defence. This is most likely due to the proximity of the Naval bases in Portsmouth and Gosport and the presence of the NATS offices in Swanwick. Manufacturing and construction industries are slightly higher employers in Fareham than the national average. Wholesale and Retail, Human Health and Social Work, Construction and Education are also major employment sectors in the Borough, although these are generally in line with regional and national averages.

Table 3: Jobs by Industry 2011

	Fareham (employee jobs)	Fareham (%)	South East (%)	Great Britain (%)
Agriculture, Forestry and Fishing	149	0.26	0.67	0.81
Mining and Quarrying	35	0.06	0.13	0.17
Manufacturing	5581	9.88	7.19	8.84
Electricity, Gas, Steam and Air Conditioning Supply	403	0.71	0.57	0.55
Water Supply; Sewerage, Waste Management and Remediation Activities	366	0.64	0.69	0.69
Construction	4506	7.98	7.97	7.68
Wholesale and Retail Trade; Repair of Motor Vehicles and Motor Cycles	8331	14.76	15.56	15.92
Transport and Storage	2886	5.11	5.22	5.01
Accommodation and Food Service Activities	2357	4.17	5.03	5.56
Information and Communication	2513	4.45	5.51	4.07
Financial and Insurance Activities	2368	4.19	4.50	4.38
Real Estate Activities	697	1.23	1.43	1.46
Professional, Scientific and Technical Activities	3487	6.18	7.46	6.70
Administrative and Support Service Activities	2571	4.56	5.15	4.92
Public Administration and Defence; Compulsory Social Security	5887	10.43	6.00	5.89
Education	5587	9.90	10.14	9.89
Human Health and Social Work Activities	6329	11.21	11.62	12.40
Arts, Entertainment and Recreation; Other Service Activities	2337	4.14	4.90	4.79
Activities of Households as Employers; Undifferentiated Goods - and Services -	41	0.07	0.15	0.12

Producing Activities of Households for Own Use				
Activities of Extraterritorial Organisations and Bodies	14	0.02	0.05	0.08

Source: Census 2011

Business Clusters

- 3.22 As well as the broad spread of use classes and number of jobs provided in broad sectors, Fareham is also home to a number of important clusters. The Fareham Business Needs Survey showed evidence of business, computing and professional services sectors clustering, with smaller groups around the electronics, aviation, telecommunications and construction sectors.
- 3.23 Research by Portsmouth University ('Clusters of Potential' and 'Cluster analysis of Fareham Borough Council area, including Whiteley) also identified aerospace and defence, processed food and transport & logistics as clusters that are doing well in Fareham.

Business Size

- 3.24 The ONS Inter Departmental Register categorises businesses as either Enterprises or Local Units. An enterprise is a combination of units in one business or as part of one business e.g. a franchise. A Local Unit is an individual site for an enterprise e.g. a shop or factory. There is overlap between the figures for enterprises and Local Units.
- 3.25 The total number of Enterprises in Fareham Borough has increased between 2011 and 2016 from 3,700 to 4,325. During this period, the number of enterprises employing no more than 9 people increased from 3,260 to 3,810 enterprises, although the overall proportion has remained slightly below the county, regional and national averages. Over the same period the number of large enterprise employing 250 or more people has remained consistent between 10 to 15 enterprises. The overall proportion of enterprises of this size has consistently been slightly below the county, regional and national averages over this period.
- 3.26 There is a similar trend for Local Units, whilst the overall number increased from 4,515 to 5,100 between 2011 and 2016. During this period, the number of local units employing no more than 9 people increased from 3,680 to 4,210 local units, although the overall proportion has remained below the county, regional and national averages. Over the same period, the total number of large local units employing 250 or more people remained constant at 20 local units. The overall proportion of local units of this size is comparable to the county, regional and national averages. Table 4 provides further information on business sizes in Fareham, Hampshire and the South East.

Table 4: Business Size

Persons Employed	Fareham	Hampshire	South East
Enterprises			
Micro (0 to 9)	88.1%	89.0%	89.8%
Small (10 to 49)	9.8%	9.1%	8.3%
Medium (50 to 249)	1.7%	1.5%	1.5%
Large (250+)	0.2%	0.4%	0.4%
Local Units			
Micro (0 to 9)	82.5%	84.4%	85.2%
Small (10 to 49)	14.3%	12.6%	12.0%
Medium (50 to 249)	2.7%	2.6%	2.4%
2Large (250+)	0.4%	0.4%	0.4%

Source: Inter Departmental Business Register (ONS)

Changes in Use Classes

- 3.27 Out of changes made to permitted development rights through amendments to the Town and Country Planning (General Permitted Development) (England) Order, the most relevant to this interim ELR is the permitted change from B1(a) office use to C3 Residential use (subject to prior approval covering flooding, highways, transport issues and contamination). As noted in paragraph 1.14, this permitted change was confirmed as permanent through the Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016).
- 3.28 A “ripple” effect of office to residential conversion has been outlined in Savills study, this could be a forecast of what to expect in Fareham. The Borough has already lost some of its employment floorspace as a direct result of this change in permitted development rights. Examples of such losses include offices at Furzehall Farm and Fareham Point, both on Wickham Road. These along with other recorded losses are of some concern however, the emerging importance and focus of the former HMS Daedalus site (Solent Enterprise Zone) will help mitigate against these losses and enable the Council to meet its B1 employment floorspace supply targets.

Review of existing Employment Sites

- 3.29 Table 5 lists all sites within the Borough currently in employment use and recommended for protection, including boatyards and countryside employment sites. These sites are considered to be the major employment areas in the Borough and have been recommended for protection following a broad interim assessment. They should still be retained for B Class employment use, only if it can be proven that such a use is no longer viable should buildings in these sites be considered for other uses. Maps for each of these sites are included in the appendix to this document.
- 3.30 This protection from non-employment uses is deemed necessary despite changes which have been made to both temporary and permanent permitted development rights. Notwithstanding these changes and recent conversions from office to

residential approved via the prior approval process, it is still considered important to protect important sites where possible. This sends a clear message that, outside any of the parameters to be set within the Government's changes to the permitted development rights, these sites will be retained for employment uses.

- 3.31 There are a number of sites within the Borough that are not considered to be suitable for protection for future employment uses. Whilst some of these sites contain small scale businesses that do contribute to overall economic development in the Borough, they are not considered to be strategic in nature and thus alternative uses can be considered if this is the desire of the market. Table 6 lists all those sites which are not recommended for protection. Maps for each of these sites are included in the appendix to this document.
- 3.32 Detailed scoring assessments of individual sites to be retained or discounted for protection for employment purposes, will be produced following a further detailed review of the sites and their suitability for B class employment uses for the Regulation 19 publication version of the new Local Plan.

Table 5: Existing Employment Sites to be retained

ID	Site Name	Location	Size	Comments
39	Fareham Industrial Estate and Broadcut	Edge of Centre	Large	Large established industrial park including pockets of B1 and open storage. Edge of Centre location.
63	Castle Trading Estate & Murrills Estate	Urban Area	Large	Combination of regular B2 estate north of East Street (Murrills Est.) and larger organic estate to south (Castle Trading Est.). Adjacent to boundary with Portsmouth CC.
65	Fort Wallington Industrial Estate	Urban Area	Large	Includes mix of B classes at Fort Wallington and B1 office park at Fareham Heights. Strong employment concentration with good access to M27.
74	Newgate Lane & Speedfields	Urban Area	Large	Large site, consisting of industrial units, largest concentration of car sales vendors in the Borough and other retail units. Access off congested Newgate Lane.
76	Fort Fareham Industrial Estate	Urban Area	Large	Grade II fort converted to fairly intensive employment uses, mostly B2. Access off congested Newgate Lane.
77	Palmerston Business Park	Urban Area	Large	Relatively modern industrial area, comprising mostly of B2 but also some B1 and B8. Access off congested Newgate Lane.
78	Segensworth South & Kites Croft	Urban Area	Large	Large industrial area with relatively modern additions. Mostly B1 and B2 with a range of unit sizes.
79	Segensworth East Industrial Estate	Urban Area	Large	Large established industrial estate incl. all B use classes. Adjacent to Jct 9 of M27.
80	Segensworth West Industrial Estate	Urban Area	Large	Large established industrial estate with a mix of B1 and B2 units. Close to M27 Jct 9 and Park Gate Local Centre.
81	Park Gate Centre & North	Local Centre	Large	Includes concentration of office uses along Botley Road as well as B2 area along Duncan Road. Located between Park Gate Centre and Swanwick railway station.

ID	Site Name	Location	Size	Comments
82	Park Gate Business Centre	Edge of Centre	Large	Medium industrial estate located between railway line and M27 motorway.
84	Fareham Point, Wickham Road & North end of High St	Town Centre	Medium	Concentration of offices within the Town Centre. Part of the site no longer recommended for protection has recently been converted to residential use following no objection to a prior approval application.
87	West End (West), South of Station Roundabout	Town Centre	Medium	Office building close to Fareham Town Centre located between A27 and the railway line.
90	Boatyard Industrial Estate	Urban Area	Medium	Small industrial estate in mainly residential area with public open space to north.
92	Salterns & Delta Business Park	Urban Area	Medium	Two local business parks either side of Salterns Lane. Mainly B2 at Salterns, with B1 offices and day nursery at Delta Business Park.
95	Funtley Court	Urban Area	Medium	Former school converted to B1 space. Expansion space to rear.
96	The Tanneries	Urban Area	Medium	Medium industrial estate within conservation area. Mix of uses and building styles.
98	Brook Avenue/Brook Lane	Urban Area	Small	Small site in low density residential area, providing a mix of retail and B1 floorspace.
99	Warsash Village Centre	Local Centre	Medium	Small B2 and B1 units in behind retail units in village centre location.
100	Swanwick BP & Oslands Court.	Urban Area	Medium	Includes the marine orientated Swanwick business park and adjacent B1 Oslands Court. In close proximity to boatyard cluster in Lower Swanwick.
102	Eastlands Boat Yard & B.P.	Rural	Medium	Boatyard. Includes boatyard and associated retail, B1 and B2. Limited access, but forms part of marine cluster along Hamble.
103	RK Marine	Rural	Small	Boatyard. Well used site that forms part of cluster of Marine uses in Lower Swanwick

ID	Site Name	Location	Size	Comments
104	Swanwick Marina	Rural	Medium	Boatyard. Large marina and associated B1 and B2 buildings. Forms part of a cluster of Marine uses in Lower Swanwick.
105	Universal Shipyard	Rural	Medium	Boatyard. Poor access down narrow road, forms part of marine cluster along Hamble.
106	Stone Pier Yard	Rural	Medium	Boatyard. Located near Warsash village centre and forms part of wider marine uses along Hamble.
107	Wicor Marine	Rural	Medium	Boatyard site. Only boatyard in Portchester and adjacent to Cranleigh Road site.
108	Lower Quay Boat Yard	Urban Area	Medium	Boatyard site. Only boatyard in Fareham (town) and located within conservation area.
126	Kiln Acre, Wickham Road	Urban Area	Medium	Mixture of offices, industrial units and sui generis uses fronting Wickham Road. Part of wider economic development uses that span Wickham Road.
127	Parkway, Wickham Road	Urban Area	Small	Two reasonably modern office blocks in use with associate parking. Part of wider economic development uses that span Wickham Road.
128	Furzehall Farm, Wickham Road	Urban Area	Medium	Collection of offices in new blocks and older converted buildings close to M27 junction 10. Part of wider economic development uses that span Wickham Road. Part of the site no longer recommended for protection has recently been converted to residential use following no objection to a prior approval application with additional new residential development also permitted.
138	Blackbrook Road Industrial Estate	Urban Area	Medium	Medium industrial estate in residential area located away from strategic road network.
139	Waterside House	Urban Area	Medium	Established B1 office site. Adjacent to residential and Delme roundabout.
161	High Walls, North of East Street	Town Centre	Small	Single substantial office building with good links to Fareham Town Centre.

ID	Site Name	Location	Size	Comments
163	Castle Court	Portchester East	Small	Well located office building within Portchester District Centre.
165	Cams Estate	Rural	Large	High quality business park set in conservation area and grounds of country house.
172	Daedalus (Solent Enterprise Zone)	Rural	Large	Industrial park type uses in the earlier stages of development.
173	National Air Traffic Services	Rural	Large	Large B1 office block for specific occupier.
179	Spurlings Road Industrial Estate	Rural	Medium	Established industrial estate within close proximity to Junction 11 of the M27.
1628	South of Solent Way	Urban Area	Small	Southern section of industrial estate in Whiteley that falls within Fareham's Borough boundary.
1700	242-248 Gosport Road	Fareham East	Medium	Terrace of relatively modern industrial/warehouse/retail units fronting Gosport Road.

Table 6: Sites not recommended for protection

ID	Site Name	Ward	Comments
36	Charity Farm	Fareham North	Within Welborne boundary. Site will be lost / redeveloped as part of Welborne.
37	Pinks Timber Yard	Rural	Medium site with a mix of open storage and industrial units. Located within Welborne Plan boundary – set aside for residential. Live planning application currently being considered for residential use.
40	Gosport Road Bus Depot	Fareham East	Purpose built bus depot. Would be difficult to "re-let" if current occupiers vacated.
83	Windmill Grove	Portchester East	Permission granted for residential uses in December 2016. Residential uses currently under construction.
85	Lysses Court	Fareham East	Small Town Centre site. Poor access, semi retail uses present.
86	1&2 The Avenue	Fareham North	Site already in semi-retail and sui-generis use. Being considered as part of wider station area redevelopment.
88	Part of West End, South of Station roundabout	Fareham North	Site has been promoted for residential use.
91	Lower Quay & Quayside	Fareham East	Mix of uses with semi-retail and sui generis present.
93	Hammonds	Hill Head	Mix of uses with semi-retail and sui generis present.
94	Corner of Stow Estate and Highlands Road	Fareham North West	Very small site predominated by residential surroundings.
97	R.O. Bridge Road Parade	Sarisbury	Limited occupancy rate and poorly related to surroundings.
101	Coal Park Lane	Sarisbury	Limited occupancy rate and poorly related to surroundings.
133	Barnbrook Systems	Fareham North	Very small site in a wholly residential area.
137	Swanwick Shore Road	Sarisbury	Site forms residential part of permitted wider redevelopment of Swanwick Marina.

186	Albany Business Centre	Fareham East	Countryside site. Currently poorly located but will be adjacent to Welborne in due course.
187	310A-312 & 316 Botley Road	Sarisbury	Countryside site. Mix of uses, some semi-retail and sui-generis. Protection not justified.
1232	8-10 Southampton Hill	Titchfield	Long term vacant, no longer considered viable for B class employment use.
1261	Cranleigh Road	Portchester East	Poorly located countryside site.
1267	Brook Lane	Park Gate	Building is partially occupied. Limited relationship with surrounding residential area.
1272	Dean Farm Estate	Fareham North	Part of Welborne Plan.
1274	Carron Row Farm	Titchfield	Countryside site with poor access. Sui generis uses present.
1275	St Margarets Lane	Titchfield	Countryside site with poor access. Sui generis uses present.
1276	North Coal Park Lane	Sarisbury	Countryside site with poor access. Sui generis uses present.
1280	Great Brook	Warsash	Countryside site with poor access. Sui generis uses present.
1281	Fontley Farm House	Fareham North	Countryside site with poor access. Sui generis uses present.
2960	Part of Fareham Point, Wickham Road & North End of High Street	Fareham East	Residential use granted following no objection to a prior approval in 2014 for the northern most part of this previously retained employment site and therefore no longer considered appropriate for protection.
2963	Part of Furze Court, Wickham Road	Fareham East	Residential use granted following prior approval application and further planning permission for residential uses on the northern part of the site.
3141	Riverside Yard	Fareham East	Countryside site. Currently poorly located but will be adjacent to Welborne in due course.

Section 4: Stage 2 – Creating a Picture of Future Requirements

PUSH South Hampshire Strategy – Employment Land Requirements

- 4.1 Fareham benefits from being a part of the Partnership for Urban South Hampshire (PUSH), which has undertaken a great deal of research and collaborative working in order to establish targets for the sub-region. The PUSH Spatial Position Statement (2016) provides the latest requirements on apportionment figures for employment floorspace which each member local authority will be required to deliver within their respective areas. The apportionment figures are based partly on the potential of each area. The PUSH apportionment figures are considered to be a sufficiently robust methodology for meeting the Planning Practice Guidance with regards to undertaking economic development needs assessments.
- 4.2 The PUSH Spatial Position Statement identifies that 971,000 sq.m of net additional employment floorspace should be provided in the South Hampshire Sub-region by 2034. This is broken down for the Borough, which is expected to deliver 119,000 sq.m of total employment floorspace between 2011 and 2036. Out of this total, 55,000 sq.m of office floorspace and 64,000 sq.m of Mixed B-Class floorspace has been apportioned to Fareham Borough.
- 4.3 However, the apportionment figure for the Borough has been increased by an additional 2 years (at the PUSH Spatial Statement rate of 5,174 sq.m per annum) in order to plan for 2036. This floorspace, 11,000 sq.m, has been added to the mixed B-class (B1c, B2, B8) floorspace need in order to ensure consistency with the underlying need evidence for mixed B-class employment uses. Table 7 below shows the employment floorspace by type which is required over the period of the new Local Plan between 2011 and 2036.

Table 7: Fareham Borough Employment Floorspace Need 2011-2036 by B Class Employment Type

Floorspace type	Floorspace need (sq. m)
<u>Office</u> Office (B1a), Research & Development (B1b)	55,000
<u>Mixed Industrial</u> Light Industrial (B1c), General Industrial (B2), Storage & Distribution (B8)	75,000
Total	130,000

Market Needs and Requirements

- 4.4 Further evidence on market needs and requirements will be provided within an update of this interim ELR which will be published alongside the Regulation 19 publication version of the new Local Plan. This evidence will include a detailed assessment of the specific employment needs that can be accommodated for on key sites that will provide for employment including Daedalus and Welborne. Additional evidence which could be made available either by the Solent LEP or PUSH in the lead up to the publication stage of the new Local Plan will also inform this further review of this ELR where appropriate. This additional information and evidence will accord with the Planning Practice Guidance with regards to further understanding the needs of the market through an analysis of market intelligence (e.g. the views of local agents / business surveys) and market signals (e.g. changes in rental values).

Section 5: Stage 3 – Meeting Future Requirements

- 5.1 This stage of the ELR is to show how the complete picture of future requirements (as set out in Table 7) can be met throughout the Borough through completions, sites with permission and potential sites identified through the Strategic Employment Land Availability Assessment (SELAA). It is important to note from the information in this section that not all of the potential sites identified in Table 9 will be allocated for employment use in the Draft Local Plan. Section 6 will subsequently include a more detailed analysis for determining which sites will be suitable for recommending protection as employment allocations.

Completions & Losses

- 5.2 Floorspace completions over the period between 2011/12-2016/17 have constituted 692 sq.m of offices and 21,971 sq.m of mixed industrial employment. Floorspace losses over the same period total 7,344 sq.m of offices and 6,402 sq.m of mixed industrial employment. This means that there has been an overall net loss of offices of 6,652 sq.m of floorspace over this period with a net gain of 15,569 sq.m of mixed industrial employment.

Sites with Permission

- 5.3 There are also a number of sites in the Borough which already benefit from planning permissions that have yet to be fully implemented. This includes some sites currently under construction and others that have a material start but are yet to be implemented.
- 5.4 Table 8 sets out all of those sites with planning permission and should be considered suitable for employment use as they have outstanding permissions (this table is taken from Hampshire County Council 2017 monitoring figures).

Table 8: Status of sites with Permitted Floorspace Availability⁴

Address	Comments
The Walled Garden, Cams Hall	Not started (existing employment allocation located adjacent to Cams Estate)
Swanwick Marina	Construction commenced.
Daedalus Airfield, Hangars East	Construction commenced, part completions
Daedalus Airfield, Hangars West	Not commenced
12 Brunel Way	Not commenced (located within Segensworth East Industrial Estate)
2200 Talbot Road	Not commenced (located within Segensworth South Industrial Estate)
Furzehall Court, Wickham Road	Not commenced
Portsmouth Marine Engineering, Lower Quay	Not commenced (located within Lower Quay Boat Yard)
Solent 2, Whiteley	Not commenced
Midpoint 27, Cartwright Drive	Not commenced
Total Permitted Gain for above sites	74,882 sq.m

Vacancies – Industrial and Office

- 5.5 Valuation Office statistics show that there is 556,000 sq.m of industrial floorspace in the Borough totalling 950 industrial hereditaments. Valuation Office statistics show that there is 154,000 sq.m of office floorspace in the Borough totalling 550 office hereditaments. Statistics on vacancies for both industrial and office premises are not currently available. These will be provided pending their availability when the next update of the ELR is published alongside the Regulation 19 publication version of the new Local Plan.

Potential Sites Considered for Allocation

- 5.6 Table 9 shows all the potential sites to be considered. The sites are a combination of incomplete or outstanding Local Plan allocations, the Borough's Centres, areas within or adjoining industrial sites and sites that have been promoted for employment / potential employment use for the Draft Local Plan 2017. Each of these sites apart from those within the Town and District and Local Centres have subsequently been

⁴ Data on planning permissions is provided by Hampshire County Council's Land Supply Team.

assessed through the Strategic Employment Land Availability Assessment (SELAA)⁵. Table 9 helps to give a broad indication of the overall employment supply that could be provided from these sites. It is important to note however that not all of these sites will be allocated for employment use in the Draft Local Plan. Maps for each of these sites are included in the appendix to this document.

⁵ The SELAA includes an assessment of sites and broad locations of at least 0.25 hectares (or 500 square metres of floor space) and above. All sites assessed have been considered to be either suitable, available and/or of market interest.

Table 9: Potential Sites Considered for Allocation

Site ID	Address	Comments
20	Land at Standard Way, Wallington	Site not currently identified as employment land within the existing Fareham Local Plan. The Strategic Employment Land Availability Assessment identifies a potential to provide between 2,000 -2,500 sq.m of employment floorspace for B2 or B8 uses. Site falls within existing urban fringe and has good road access via Standard Way.
81	Park Gate Centre & North	Area currently identified as existing employment land within the existing Fareham Local Plan. The Strategic Employment Land Availability Assessment identifies a potential for increasing B1 employment uses in the centre or along Botley Road although no indicative floorspace has been identified.
124	Solent 2, Whiteley	Site currently identified as an employment allocation within the existing Fareham Local Plan. It also benefits from extant planning permission as shown in Table 15. The Strategic Employment Land Availability Assessment identifies a potential for developing up to 23,500 sq.m of employment floorspace for B1, B2 or B8 uses although it is important that this isn't double counted in addition to the extant permission on the site.
198	Civic Quarter, Fareham Town Centre	Area not currently identified as employment land within the existing Fareham Local Plan. Residential uses would be preferable in this area. However, economic uses such as offices would be permitted if such proposals were to come forward.
205	Land north of St Margarets Roundabout, Titchfield	Site not currently identified as employment land within the existing Fareham Local Plan. The Strategic Employment Land Availability Assessment states that the site is suited to B2 or B8 uses although no indicative floorspace has been identified. Site is well suited due to its proximity to the road network. Recent residential development to the north of the site requires a sufficient buffer to preserve the amenity of the new neighbouring development.
211	Fareham Station East	Area not currently identified as employment land within the existing Fareham Local Plan- proposed as a residential allocation. However, site represents a suitable location for economic uses such as offices.

Site ID	Address	Comments
212	Fareham Station West	Area not currently identified as employment land within the existing Fareham Local Plan - proposed as a residential allocation. However, site represents a suitable location for economic uses such as offices.
458	Portchester District Centre	Area not currently identified as employment land within the existing Fareham Local Plan - proposed as a residential allocation. However, site represents a suitable location for economic uses such as offices.
1325	Crofton Conservatories, Fareham	Site not currently identified as employment land within the existing Fareham Local Plan - proposed as a residential allocation. However, site represents a suitable location for economic uses such as offices.
1352	Land at Pinks Hill, Wallington	Site not currently identified as employment land within the existing Fareham Local Plan. Site considered through the Strategic Employment Land Availability Assessment but discounted having been proposed as a residential allocation.
1365	Land adjoining Fort Wallington Industrial Estate, Wallington	Site not currently identified as employment land within the existing Fareham Local Plan. Site considered through the Strategic Employment Land Availability Assessment but discounted having been permitted for uses associated with the waste transfer station.
1393	Locks Heath District Centre	Area not currently identified as employment land within the existing Fareham Local Plan. However, economic uses such as offices would be permitted if such proposals were to come forward.
1425	Market Quay Car Park	Area not currently identified as employment land within the existing Fareham Local Plan - proposed as a residential allocation. However, site represents a suitable location for economic uses such as offices.
1914	Fareham Shopping Centre	Area not currently identified as employment land within the existing Fareham Local Plan. However, site represents a suitable location for economic uses such as offices.
1999	The Walled Garden, Cams Hall,	Site currently identified as an employment allocation within the existing Fareham Local Plan. It also benefits from extant planning permission as shown in Table 15. The Strategic

Site ID	Address	Comments
	Fareham	Employment Land Availability Assessment identifies a potential for developing up to 2,000 sq.m of employment floorspace for B1 or B2 uses as per the extant planning permission for the site.
2001	Midpoint 27, Cartwright Drive	Site currently identified as an employment allocation within the existing Fareham Local Plan. It also benefits from extant planning permission as shown in Table 15. The Strategic Employment Land Availability Assessment identifies a potential for developing up to 4,700 sq.m of employment floorspace for B1 or B2 uses although it is important that this isn't double counted in addition to the extant permission on the site.
3011	Land at Down Barn Farm (East of Boarhunt Road), North Fareham	Site not currently identified as employment land within the existing Fareham Local Plan. Site considered through the Strategic Employment Land Availability Assessment but discounted due to sensitive landscape issues.
3022	Land West of Newgate Lane, Peel Common	Site not currently identified as employment land within the existing Fareham Local Plan. The Strategic Employment Land Availability Assessment identifies a potential for developing between 10,000 and 12,000 sq.m of employment floorspace for B1 or B8 uses. However site is located within the Strategic Gap and site considered to not be commercially attractive.
3025	Little Park Farm	Site currently identified as an employment allocation within the existing Fareham Local Plan. The Strategic Employment Land Availability Assessment identifies a potential intensification between 10,000 sq.m and 11,200 sq.m of employment floorspace for B1, B2 or B8 uses. No neighbouring constraints although access constraints mean only low traffic uses would be achievable unless access solutions can be found.
3033	Land at Peak Lane Nurseries, Stubbington	Site not currently identified as employment land within the existing Fareham Local Plan. Site considered through Strategic Employment Land Availability Assessment but ruled out through sensitive landscape issues.
3034	Land rear of Waste Transfer Station, Wallington	Site not currently identified as employment land within the existing Fareham Local Plan. Sites considered through Strategic Employment Land Availability Assessment but no

Site ID	Address	Comments
		suitable highway access identified.
3054	Land at Segensworth West	Site currently identified as existing employment land within the existing Fareham Local Plan. Site comprises potential industrial land within the existing employment site without benefit of planning permission. The Strategic Employment Land Availability Assessment identifies a potential intensification between 10,000 – 11,500 sq.m of employment floorspace for B1, B2 or B8 uses. Site is suitable although parts of it are heavily treed with established habitats.
3055	Land at Southampton Road, Titchfield	Site not currently identified as employment land within the existing Fareham Local Plan. Site considered through Strategic Employment Land Availability Assessment but considered to be too small and constrained.
3113	Daedalus East (Faraday Business Park)	Part of the site is identified as existing employment land within the existing Fareham Local Plan. The Strategic Employment Land Availability Assessment identifies potential intensification for developing up to 40,000 sq.m of additional employment floorspace for B1 or B2 uses (in addition to 28,000 sq.m already consented). Site has limited constraints and benefits from improvements to the Strategic Road Network.
3114	Daedalus West (Swordfish Business Park)	Much of the site is currently identified as existing employment land within the existing Fareham Local Plan. The Strategic Employment Land Availability Assessment identifies a potential for developing up to 8,000 sq.m of additional employment floorspace for B1 or B2 uses (in addition to 26,000 sq.m already permitted or retained). Site has limited constraints and benefits from improvements to the Strategic Road Network.
3125	Land at Segensworth Roundabout	Site not currently identified as employment land within the existing Fareham Local Plan. The Strategic Employment Land Availability Assessment identifies a potential for up to 1,500 sq.m of employment floorspace for B1 employment uses. Site has limited constraints, but is proposed as a residential allocation.

- 5.7 Each of the sites included in Table 9 are reviewed in more detail in Section 6. Maps for each of these sites are also included in the supporting appendix (see the Potential Sites Considered for Allocation section).
- 5.8 Further to the information provided in Table 9, it is important to note that Welborne is expected to deliver 105,000 sq.m of employment floorspace (gross external floorspace) over the lifetime of the development (up to 2041) (83,000 sq.m net). The anticipated scale and mix of uses is based on the most recent information available on land ownership and land acquisition. However, the majority of this will be delivered after the necessary major improvements to Junction 10 of the M27 which based on latest information is estimated to commence between 2020 and 2022. For the purposes of this interim ELR only the initial phases of development can be used towards meeting the Borough's requirements up to 2036. The trajectory in the Welborne Employment Strategy estimates that 11,400 sq.m of offices and 23,630 sq.m of B2/B8 floorspace can be delivered at Welborne by 2036.

Meeting Floorspace Requirements

- 5.9 Taking into consideration all the above information, Table 10 has been developed to show how the Borough's employment floorspace targets can be met and the contribution made by the various sources. It is important to note that Table 10 includes all potential sites which could provide for employment uses having been identified through the Strategic Employment Land Availability Assessment (SELAA) even if they do not end up providing for the amount of floorspace estimated or be the most appropriate for the intended employment use. Section 6 includes a further detailed analysis of these potential sites as part of the process for determining which of these should be allocated for employment in the Draft Local Plan. The permissions and net completions figures in Table 10 have been sourced from Hampshire County Council (HCC) monitoring data.

Table 10: Employment Floorspace Supply 2011-2036

Source	B1	B2/B8	Total
Net Completions 2011-2017	-6,652	15,569	8,917
Planning Permissions (Existing Allocations)	28,070	42,530	70,600
Planning Permissions (Windfall) ⁶	1,744	2,538	4,282
Welborne	11,400	23,630	35,030
<i>Sub-Total</i>	<i>34,562</i>	<i>84,267</i>	<i>118,829</i>
Potential Sites			
Standard Way, Wallington	0	2,500	2,500
Daedalus East (Faraday Business Park)	4,000	36,000	40,000
Daedalus West (Swordfish Business Park)	1,000	7,000	8,000
Little Park Farm, Segensworth North	0	11,200	11,200
Land at Segensworth West	0	11,500	11,500
Land at Segensworth Roundabout	0	1,500	1,500
Solent 2, Whiteley	23,500*	0	23,500*
Midpoint 27, Cartwright Drive	0	4,700*	4,700*
Land West of Newgate Lane, Peel Common	0	12,000	12,000
<i>Sub-Total</i>	<i>5,000</i>	<i>81,700</i>	<i>86,700</i>
Total	39,562	165,967	205,529
<i>Requirement (including additional 2 years to 2036)</i>	<i>55,000</i>	<i>75,000</i>	<i>130,000</i>
Surplus/Deficit	-15,438	+90,967	+75,529
* Floorspace quantum for Midpoint 27, Cartwright Drive and Solent 2, Whiteley are included in the planning permission figures at the top of Table 10.			

- 5.10 Table 10 shows there is a comfortable 58% overall oversupply on the overall requirement if all sites identified through permissions, allocations, vacancies and potential sites and floorspace identified from the SELAA were to be developed. However, there are clear variations in terms of supply between different use classes. There is a significant oversupply in potential B2/B8 uses, due mainly to the provision of the Enterprise Zone, whilst there is a noticeable deficit in pure office provision. It is important to note that current vacancies have not been included within the supply figures in Table 10 whereby it is reasonable to assume that the overall surplus of 75,529 sq.m would be higher if these were to be accounted for.

⁶ An additional allowance has been made for windfall permissions over the course of the Plan period.

- 5.11 Although the supply of office floorspace appears, at a glance, to be insufficient there are a number of important factors to consider. Firstly there is a substantial part of the overall supply from above which is shown as potential B1-B8 use (205,529 sq.m), where the final use has yet to be determined. It is conceivable that a proportion of this will be for offices, although it is difficult to ascertain at this juncture what this figure is likely to be.
- 5.12 It is also important to consider that “the boundaries between different uses classes are becoming increasingly blurred, for example, where businesses that have significant on-line sales want to have within the same building warehousing space, a call centre, some office space, and perhaps space for customisation of products”. It is becoming increasingly important, therefore, to allow for flexibility when planning for economic development.
- 5.13 Furthermore, allocating unsuitable office sites for economic development uses is likely to lead to further non-office development which will only exacerbate the existing situation. There are some sites which do appear suitable for office development (Town Centre sites), but evidence and recent trends indicate that these are unlikely to attract significant market interest.
- 5.14 Given the above, it is considered that the best solution is to allocate sufficient sites to meet the overall employment floorspace requirement, whilst allowing for flexibility between uses. Further work is expected to be undertaken in the time leading up to the Regulation 19 publication version of the new Local Plan including a more detailed assessment on the type of employment uses that could be accommodated within the Borough’s key employment sites, including Daedalus and Welborne.

Section 6: Analysis of Key Sites

- 6.1 A more detailed analysis of the sites discussed in Section 5 subsequently considered suitable or unsuitable for employment floorspace provision is included in this section. It is important to note that a significant amount of the potential supply identified in Table 10 has been discounted in terms of contributing to the Borough's overall employment floorspace target of 130,000 sq.m. Table 11 shows all of the potential sites recommended for allocation that would play an important role in contributing towards this target in addition to completions since 2011 and outstanding permissions data. The detailed analysis in this section will be informed by further work and evidence which becomes available in the lead up to the Regulation 19 publication version of the new Local Plan.

Table 11: Potential Sites Recommended for Allocation⁷

Site ID	Address	Allocated B1 Floorspace	Allocated Mixed Industrial Floorspace	Total Floorspace
20	Land at Standard Way, Wallington	0	2,000	2,000
1313	Daedalus East (Faraday Business Park)	4,000	36,000	40,000
1314	Daedalus West (Swordfish Business Park)	1,000	7,000	8,000
124	Solent 2, Whiteley	See footnote 7 below.		
2001	Midpoint 27, Cartwright Drive	See footnote 7 below.		
Sub Total		5,000	45,000	50,000
<i>Sub-Total plus total Completions, Permissions (allocations & windfall) & Welborne</i>		<i>39,562</i>	<i>129,267</i>	<i>168,829</i>
<i>Requirement (including additional 2 years to 2036)</i>		<i>55,000</i>	<i>75,000</i>	<i>130,000</i>
Surplus/Deficit		-15,438	+54,267	+38,829

- 6.2 It is important to note from Table 11 that the estimated floorspace provision for the Daedalus sites has been further revised following the initial assessment that was made through the SELAA. It is also necessary to consider that the potential 48,000 sq.m of provision at Daedalus includes up to 28,000 sq.m of hangar floorspace, which may or may not accommodate B-class employment uses, and is in addition to 4,000 sq.m of existing retained floorspace actively in commercial B-class use. The hangar floorspace has been included within the overall employment floorspace as these structures would be available for employment use; however they equally have the potential for a non-employment use, in which case this would reduce the available employment floorspace. It is also important to note that although Little Park

⁷ Solent 2, Whiteley and Midpoint 27, Cartwright Drive both have extant planning permissions and are recommended to be retained as employment allocations (the floorspace proposed have been accounted for in the planning permissions as shown in Table 8).

Farm has previously been allocated within Local Plan Part 2, there are access constraints with this site hence no inclusion of deliverable floorspace. The Walled Gardens has an extant permission whereby no floorspace has been included due to the potential for double counting.

- 6.3 Further information is now provided on all the key sites identified in Section 5 that have been considered for allocation as to why they have or have not been included within the recommended supply to meet the future floorspace requirements.

Daedalus (Solent Enterprise Zone)

- 6.4 The former HMS Daedalus site was allocated as a Major Development Site in the Local Plan, and was subsequently allocated as a Strategic Employment Site in the Core Strategy, emphasising its importance as a site for future employment uses. The site is located in the South East corner of the Borough, adjacent to the Borough boundary with Gosport. The wider plans for redevelopment of the site cross the boundaries between the authorities, with more intensive redevelopment, including residential, and re-use of existing buildings within Gosport Borough as opposed to a more spread out B2/B8 marine/aviation focussed development in Fareham.
- 6.5 The South East England Development Agency (SEEDA) acquired the Daedalus site with the intention of acting as a catalyst for economic development in South Hampshire. The site now has a much higher profile in policy terms after it was designated an Enterprise Zone in August 2011. The EZ designation raises the profile of the site and provides some incentives for businesses to locate on the EZ (primarily business rates relief). Designation has also made securing development on the site a still higher priority, with backing not just of Fareham Borough Council but also Solent LEP.

Daedalus East (Faraday Business Park) (Site Ref 3113)

- 6.6 Existing development proposals for the Daedalus East (Faraday Business Park) site are predominantly for B2 industrial and B8 warehouse uses, but it is anticipated that there will be some limited provision of B1a office or B1b R&D space. This mix of proposed use classes is pending the findings of further information and evidence that will be used to inform the Regulation 19 publication version of the new Local Plan. Outline planning consent for development at Daedalus East was granted in 2013.
- 6.7 Investment is being made into the surrounding infrastructure and the Council secured a commitment from the HCA to fund development of an Innovation Centre close to the perimeter gateway to site, aimed at stimulating new business start-ups. This opened to the public in April 2015 whilst a second Innovation Centre is now under construction. The site is considered to be suitable for further intensification of employment uses further to the B1, B2 and B8 floorspace that has already been permitted. Further information is available in the Daedalus Vision document and Daedalus evidence study.

Daedalus West (Swordfish Business Park) (Site Ref 3114)

- 6.8 The site comprises three linked triangles of land formed by the serrated edge of Stubbington, and lies on the west side of the airfield. It is expected that the site will be developed with a focus on defence and aviation activities within a secure

compound. It is expected that this part of the site will only come forward once the initial phase of the Daedalus East (Faraday Business Park) site nears completion. This section of the site is predicted to come forward in the medium term. The mix of proposed use classes is pending the findings of further information and evidence that will be used to inform the Regulation 19 publication version of the new Local Plan. The site is considered to be suitable for further intensification of employment uses further to the B1, B2 and B8 floorspace that has already been permitted.

Solent 2, Whiteley (Site Ref 124)

- 6.9 A reserved matters application for Solent 2 was approved in 2006, and work started on site in 2010. This site is one of the remaining pieces of land of a much larger employment area which is mostly within the borders of Winchester District Council. The site is adjacent to junction 9 of the M27 and immediately next to occupied employment buildings that were completed as recently as 2008.
- 6.10 The owners of Solent 2 have been actively promoted the site for housing, employment or for mixed use. This follows historical interest for developing residential uses on the site. It is argued that the length of time the site has remained undeveloped means that it is no longer suitable for employment uses, and that it is more aligned with the nearby residential development (Arabian Gardens and Berber Close) than it is to the wider Whiteley employment area.
- 6.11 The site is considered to be suitable for B1, B2 and B8 uses. Even if the site was to be fully delivered with B1a uses, the Borough would still struggle to meet its identified requirement for offices. This factor alone would therefore justify its continued protection despite the flexibility for other economic uses that should be provided. Without any delivery of offices at Solent 2, the supply of suitable and deliverable office sites is limited to some small scale permissions, allocations and that which could be delivered at Welborne by 2036.
- 6.12 The NPPF states that “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”. However, the site is “oven ready” in as much as it has an outstanding permission whereby it is considered its allocation should be retained with its delivery considered to be realistic over the period of the new Local Plan up to 2036. This approach will ensure that when the office market picks up in the sub-region Fareham has a ready supply of sites to utilise.

Midpoint 27, Cartwright Drive (Site Ref 2001)

- 6.13 Midpoint 27, Cartwright Drive received planning permission in 2017 for 4,700 sq.m of mixed B-class uses. The site is well located close to the access to Cartwright Drive and has had recent market interest.
- 6.14 The NPPF states that "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". However, given market interest in the Cartwright Drive site, it cannot be argued that there is not a reasonable prospect of this site being delivered over the period of the new Local Plan up to 2036.

Fareham Town Centre Sites

- 6.15 There are around 40 office properties in Fareham's town centre; with total floorspace of private sector office accommodation of around 14,800 sq.m (this excludes the Civic Centre and the Job Centre).
- 6.16 There is a lack of a "high quality" office space in Fareham Town Centre, with the majority of floorspace being converted residential buildings or spaces above shops. To that end, no employment floorspace figure has been included in Table 18 for the Fareham Town Centre sites. It is possible that further work will be undertaken to assess whether the Town Centre could accommodate additional office uses in the lead up to the Regulation 19 publication version of the new Local Plan. However, office development will be encouraged as part of mixed-use developments (major areas discussed in more detail below) although this is likely to be replacement floorspace for offices lost in older stock throughout the Town Centre.

Civic Area (Site Ref 198)

- 6.17 This site encompasses the area between the shopping centre and Osborn Road, and includes the Civic offices, Ferneham Hall, the library, the multi-storey car park, some surface car parking and the health centre. There are concerns about the longevity of the multi-storey car park as well as the efficiency of both Ferneham Hall and the library. The site is considered to be more appropriate for residential led uses. However, suitable employment uses could be supported if these were to come forward, particularly given the prominent location of the site in the Town Centre.

Fareham Station East (Site Ref 211)

- 6.18 Fareham Station East comprises a mix of low density employment uses, Fareham Fire Station and car parking. The site is allocated for comprehensive redevelopment within LP2, however a residential led redevelopment is considered to be more appropriate although suitable employment uses could be supported if these were to come forward.

Fareham Station West (Site Ref 212)

- 6.19 The land to the west of Fareham Station is also identified as having potential for redevelopment. The land is mainly underused but does currently have some semi-commercial uses occupying part of the site and also includes two commercial units at 1-2 The Avenue. Although the site could potentially yield an office development, it is considered that the more likely use will be residential, or potentially a care home (for which it is allocated within LP2).

Land adjacent to Maytree Road (Site Ref 1325)

- 6.20 This site is currently an underutilised mixed use area comprising of a large former car sales area and a council surface car park. The development is set back from the main road and lacks cohesion in terms of scale and style. Potential redevelopment opportunities were identified in previous retail studies, with options for large format retail units or residential with potentially retail units below, both with the potential to yield offices as well. The site has developer interest for residential use and its

location within the Town Centre means such a use would be suitable. However, suitable employment uses could be supported if these were to come forward.

Market Quay Car Park (Site Ref 1425)

- 6.21 The Market Quay car park was laid out as part of the wider Market Quay retail and leisure development of 2005/6. Previous retail studies have identified the area as a possible location for new retail development, to add another dimension to the retail core of Fareham Town Centre. The major issue with the site is the relocation of the parking, as the current car park is well used, particularly in the evenings and weekends. Whilst a multi-storey option would be a solution, this has obvious financial implications and could affect overall viability. The site is considered to be more appropriate for residential led uses. However, suitable employment uses could be supported if these were to come forward, particularly given the prominent location of the site, visible to the A32 and A27.

Fareham Shopping Centre (Site Ref 1914)

- 6.22 The site is currently an undercover shopping centre which is part of the core shopping area of Fareham Town Centre. The upper floors are underutilised, with only a small proportion used for the management of the Centre.
- 6.23 The site is also adjacent to the primary shopping area of Fareham Town Centre and as such is well served by public transport and local amenities. The upper floors of the shopping centre have recently been permitted for hotel use meaning that it is not appropriate at this stage to consider any B1 floorspace towards the overall supply.

Other Centres in the Borough

Park Gate Centre & North (Site Ref 81)

- 6.24 Unlike Locks Heath and Portchester, Park Gate Local Centre has a significant office presence, typified by small units and converted residential properties, which extends northwards out of the existing Centre boundary up Botley Road. It is highly unlikely that anything other than small scale development will occur in this area in the foreseeable future, given the relatively dense nature of the existing built environment. Although the area will not help meet our outstanding targets, it is considered an important cluster for small scale office development and should be allowed to grow with market demand.

Portchester District Centre (Site Ref 458)

- 6.25 Portchester District Centre currently has one purpose built office block within its boundary; Castle Court. There are a number of smaller A2 office areas dotted around the Centre mostly at the extremities of the pedestrianised area, which suggests that demand for new office development is low. The Centre does offer some development opportunities in general, with the car park to the south and areas to the north and east previously considered as areas for Centre expansion. However, the potential for new office floorspace as part of any such expansion is considered limited, given the small amount of existing floorspace, which reflects demand.

Locks Heath District Centre (Site Ref 1393)

- 6.26 A number of small scale extensions to Locks Heath District Centre have previously been considered. The Centre currently has an outstanding permission for new retail floorspace on one of the centre's existing blank facades. There is however, limited employment floorspace in the Centre. There remains a Council aspiration to allow for expansion of the Centre, but it is not considered that offices will play a significant part in this.

Other Potential Sites Considered for Allocation

6.27 Wallington Sites

- Land at North Wallington and Standard Way (Site Ref 20). This vacant site is to the north east of Standard Way and south of the motorway. To the south of the site is the Military Road Depot. The site is relatively flat, has ready access onto Standard Way and as such, is considered suitable to allocate for employment purposes.
- Land adjoining Fort Wallington Industrial Estate / rear of Waste Transfer Station (Site Refs 1365 and 3034). This site is currently mostly in occupation by the Waste Transfer Station, although there is adjoining land that is currently vacant. The site has been granted planning permission for a "regional facility" and is therefore considered suitable to allocate for employment purposes.
- Pinks Hill, Wallington (Site Ref 1352). It is the most visually prominent but also the most difficult in terms of topography as it slopes south easterly down towards the A27. Furthermore, the site has subsequently been promoted for residential uses, rather than employment.

Land north of St Margaret's Roundabout (Site Ref 205)

- 6.28 The area north of St Margaret's roundabout includes a small paddock outside of the urban area, with the former Air Training Corps buildings and a row of detached houses to the north. The site benefits from a prominent location to the north of a major roundabout on the A27, and has the potential to link to the established Segensworth South employment area to the north. The site is considered well suited for employment due to proximity to the road network. Recent residential development to the north requires a sufficient buffer to preserve the amenity of the new neighbouring development. However, this site should only be considered if floorspace targets or specific requirements cannot be met elsewhere.

Walled Gardens, Cams Hall (Site Ref 1999)

- 6.29 Office development was originally permitted at the Walled Garden, Cams Hall in 1996 as part of the wider redevelopment of buildings within the grounds of Cams Hall. Subsequent amended schemes for offices and server uses were permitted in 2004 and again in 2008. An application to vary the condition over the commencement date was approved in 2012. The site is part of a wider employment area and adjacent to established office uses. The unique setting ensures the site has distinctive marketability over standard modern office buildings

Land at Down Barn Farm (East of Boarhunt Road) North Fareham (Site Ref 3011)

- 6.30 This parcel of land consists of several hectares of open agricultural fields with a gentle westward slope towards a valley containing the River Wallington. A number of rural houses and agricultural buildings are in close proximity to this site. The Spurlings Road & Down Barn Farm employment area is also located close by.
- 6.31 The proposed land is located close to the M27 and is accessible from Junction 11 of the M27 as well as the Boarhunt Road. The latter is a small country road well used by commuters wishing to avoid the motorway on the way to work.
- 6.32 The site is considered to have high landscape sensitivity, and despite its commercial attractiveness, it is considered that there are sufficient suitable alternative sites to meet the floorspace need at this stage.

Land West of Newgate Lane, Peel Common (Site Ref 3022)

- 6.33 The site is considered to be suitable for employment development although local ecological issues (hedgerow dissecting the site) must be taken into account which may reduce the capacity for development. Suitable access can be achieved from Newgate Lane, which is to be by-passed by the new Newgate Lane South relief road. The site is also within the strategic gap, but due to existing built infrastructure and development, development has the potential to be integrated without causing unacceptable adverse impacts to the integrity of the gap.
- 6.34 There are other emerging sites at this stage deemed more suitable for providing employment floorspace whereby it should only be considered if floorspace targets or specific requirements cannot be met elsewhere.

Little Park Farm (Site Ref 3025)

- 6.35 The site suffers significant access problems, with the primary access coming via a single lane track from the south under the railway line. Other access options and use of the railway line have been explored but have serious questions marks over their viability. Despite the access problems the site has no neighbour constraints and almost no environmental constraints. Its position between the railway and the motorway coupled with the access problem means that the site has almost no alternative development opportunity other than low traffic generating employment. Therefore its availability for employment is considered suitable although the uncertainty over its achievability means that no floorspace has been allocated towards the overall provision figure for this site. The current access constraints also mean that it may be appropriate to de-allocate this site as an employment allocation (as per its current allocation for employment use in Local Plan Part 2), though to identify it as an employment area, which would still allow for employment uses to come forward, but without the Local Plan relying on this floorspace due to the access uncertainties.

Land at Peak Lane Nurseries, Stubbington (Site Ref 3033)

- 6.36 The site is currently in use as an operational horticultural nursery, with extensive glasshouses and associated buildings on site. The glasshouses are prominent features of the landscape, but do not detract from the agricultural character of the area or its quality. It would be difficult to accommodate significant new development

without affecting the distinctive qualities of the landscape, particularly as the views of the site are very open and expansive, particularly from vehicles travelling south along Peak Lane. The site access is currently considered unsustainable in transport terms and a new access solution would be required.

- 6.37 The site also has sensitive landscape issues and based on the information provided, the site is not considered to be suitable for employment development.

Land at Segensworth West (Site Ref 3054)

- 6.38 This large site has principle access from the Telford Way/Crompton Way roundabout in the south of the site. It is considered to be commercially attractive for B1, B2 or B8 uses. However, parts of the site are heavily treed with established habitats and would need to be carefully considered within future development. The priority habitat woodland and scrub habitats on the site are likely to be used by dormice, reptiles, butterflies, invertebrates and bats.

- 6.39 Due to the uncertainties over delivery of the site at this stage, the site is not recommended for allocation, however it is suggested that the adjoining employment boundary be extended to cover the entirety of the site, to allow for future employment uses.

Land at Southampton Road, Titchfield (Site Ref 3055)

- 6.40 The site is comprised of scrub and trees and grassland adjacent the River Meon. Habitat to the north and south of the site adjacent the River is designated, whilst the site may be SINC quality habitat. Bats, otter, water vole, dormouse, reptiles, badger and barn owl have all been recorded within 1km of the site. It also has archaeological potential and is located immediately adjacent to the Titchfield Abbey Conservation Area. As such, the site is ruled out for employment provision due to the overriding planning constraints.

Land at Segensworth Roundabout (Site Ref 3125)

- 6.41 The area to the south east of Segensworth roundabout consists of a small paddock area, some former agricultural buildings and some areas of underutilised and generally untidy land. The site is bordered by the A27 (Southampton Road) to the west and south and by a SINC to the east. The site forms part of a "green finger" of countryside that splits Titchfield Common with the more employment led parts of Segensworth. Whilst the area is mainly green, it lacks cohesion and is currently relatively inaccessible for the general public.
- 6.42 The site has historically been promoted for a mixture of employment and residential uses, and there are a number of different landowners who have an interest in the site. Redevelopment of the site would require a significant change to the current urban area boundary, and given that the overall employment supply can be met elsewhere this is not considered necessary to allocate for employment use.

Section 7: Conclusions

- 7.1 Overall, it is concluded that Fareham Borough can comfortably meet its target for industrial/warehouse development over the Plan period. This is mainly due to the major development at Daedalus, but also the floorspace that could be accommodated at Welborne and at Solent 2 in Whiteley.
- 7.2 Despite the above target supply of employment floorspace that can be met through completions, planning permission, windfall and recommended allocations, there remains an undersupply of office floorspace as the sites promoted or assessed are not considered suitable locations for office development. However, the shortfall may be reduced through the office supply at Welborne being delivered sooner than is currently anticipated.
- 7.3 As well as the suitability of the potential supply, another key issue is competition from neighbouring areas, with the most significant being Solent Business Park, Whiteley in neighbouring Winchester district. This operates as part of the local employment market and is located just over the Borough boundary from the Borough's largest employment area at Segensworth. The Winchester part of Whiteley has significant vacancies as well as potential for further expansion. In addition, there is significant potential for expansion of office floorspace at Lakeside in Portsmouth and as such, it is clear that the supply of office floorspace in the sub-region is sufficient at this stage.
- 7.4 The conclusion at this stage, therefore, is to allocate the following sites for employment use:
- Daedalus East (Faraday)
 - Daedalus West (Swordfish)
 - Solent 2, Whiteley
 - Midpoint 27, Cartwright Drive, Segensworth
 - Land at North Wallington and Standard Way, Wallington
- 7.5 Although some of these sites benefit from a current permission it is considered important to include them as proposed allocations in the Draft Local Plan in order to ensure they provide for employment uses, should any of those permissions lapse. Only when these sites have been built out should they be considered as "existing employment areas to be retained".
- 7.6 It should also be noted that the Town, District and Local Centre sites whilst not recommended for specific B class employment protection, can provide for further B1 employment opportunities whereby proposals for these uses shall be considered favourably by the Council.
- 7.7 On top of these allocations the Council should seek to protect all existing sites (those recommended in Table 5) for economic development uses, whilst taking a positive approach to allowing flexibility to account for the changing nature of modern business. Any new applications for office developments that come forward in suitable locations and help to address the current identified shortfall should be considered favourably.
- 7.8 Finally, it is important to note that this interim ELR will be updated in accordance with new information and evidence which becomes available in the period leading up to the Regulation 19 publication version of the new Local Plan.



Background Paper: Interim Employment Land Assessment Appendix 1: Site Maps

EXISTING EMPLOYMENT SITES TO BE RETAINED	
Site Ref	Site Name
39	Fareham Industrial Estate and Broadcut
63	Castle Trading Estate and Murrills Estate
65	Fort Wallington Industrial Estate
74	Newgate Lane & Speedfields
76	Fort Fareham Industrial Estate
77	Palmerston Business Park
78	Segensworth South & Kites Croft
79	Segensworth East Industrial Estate
80	Segensworth West Industrial Estate
81	Park Gate Centre & North
82	Park Gate Business Centre
84	Fareham Point, Wickham Road & North end of High St
87	280-282 (UTP) West Street, Fareham
90	Boatyard Industrial Estate
92	Salterns & Delta Business Park
95	Funtley Court
96	The Tanneries
98	Brook Avenue/Brook Lane
99	Warsash Village Centre
100	Swanwick BP & Oslands Court
102	Eastlands Boat Yard & B.P.
103	RK Marine
104	Swanwick Marina
105	Universal Shipyard
106	Stone Pier Yard
107	Wicor Marine
108	Lower Quay Boat Yard
126	Kiln Acre, Wickham Road
127	Parkway, Wickham Road

EXISTING EMPLOYMENT SITES TO BE RETAINED

Site Ref	Site Name
128	Furzehall Farm, Wickham Road
138	Blackbrook Road Industrial Estate
139	Waterside House
161	High Walls, North of East Street
163	Castle Court
165	Cams Estate
172	Daedalus Airfield, Stubbington
173	National Air Traffic Services
179	Spurlings Road Industrial Estate
1628	South of Solent Way
1700	242-248 Gosport Road

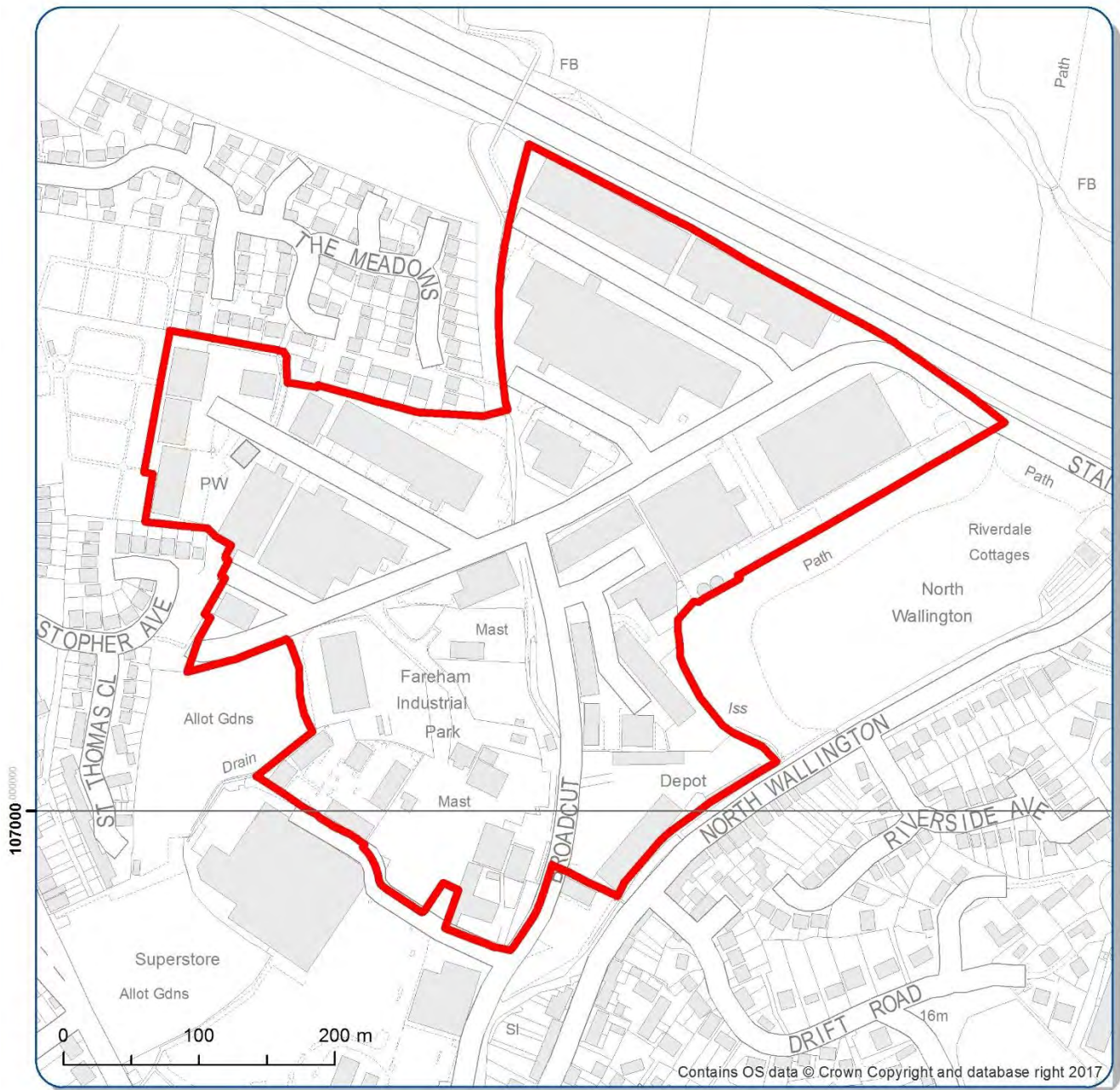
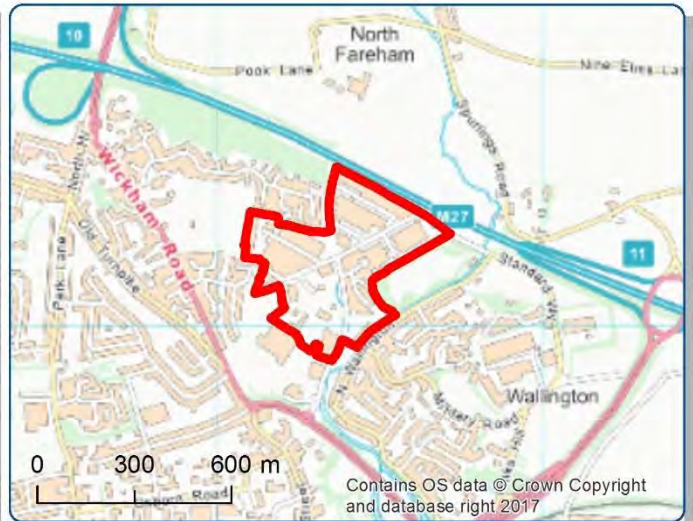
FAREHAM BOROUGH COUNCIL

SITE ID 39

FAREHAM INDUSTRIAL ESTATE AND BROADCUT



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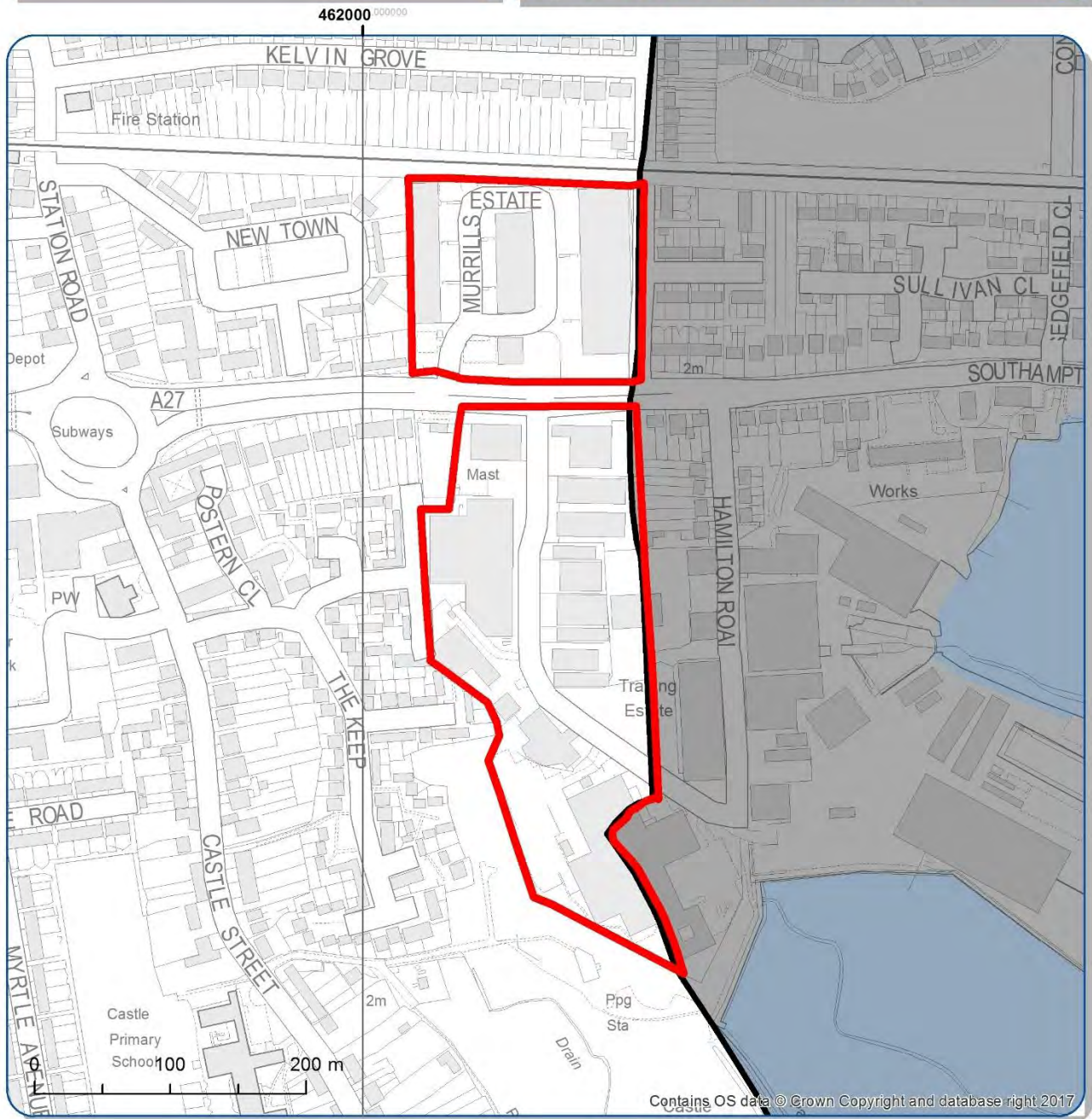
FAREHAM
BOROUGH COUNCIL

SITE ID 63

**CASTLE TRADING ESTATE &
MURRILLS ESTATE**



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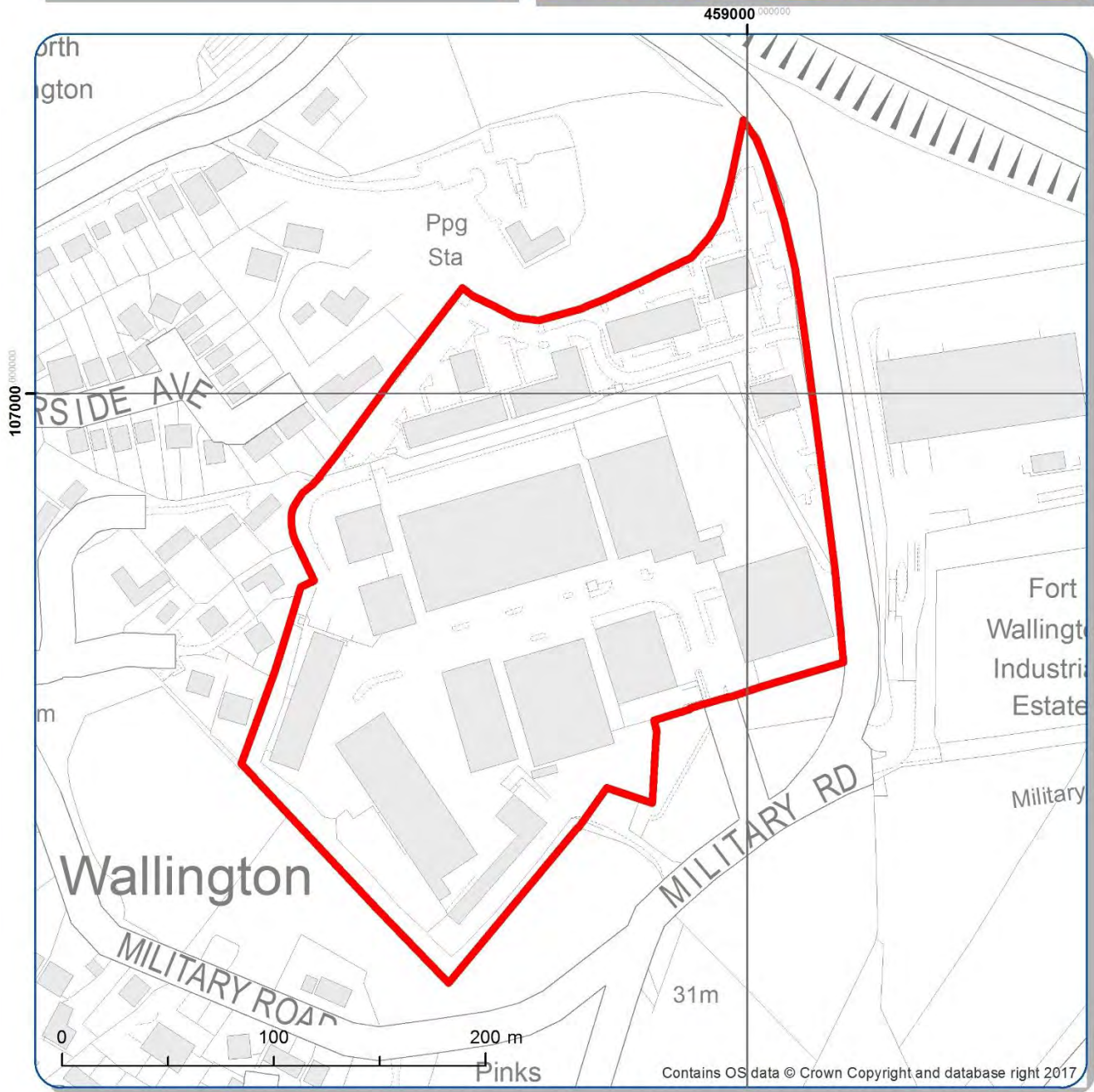
FAREHAM
BOROUGH COUNCIL

SITE ID 65

**FORT WALLINGTON INDUSTRIAL
ESTATE**



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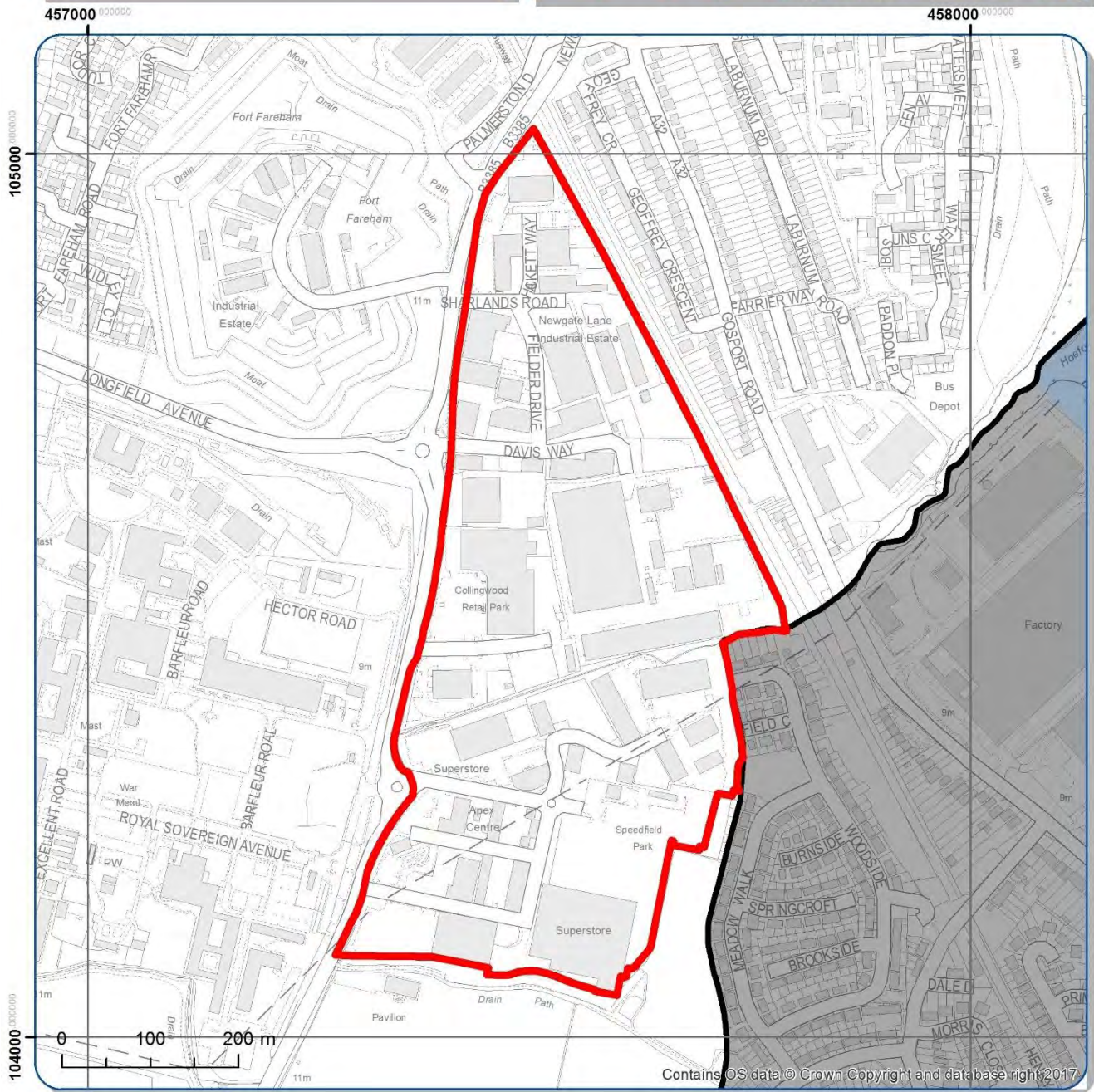
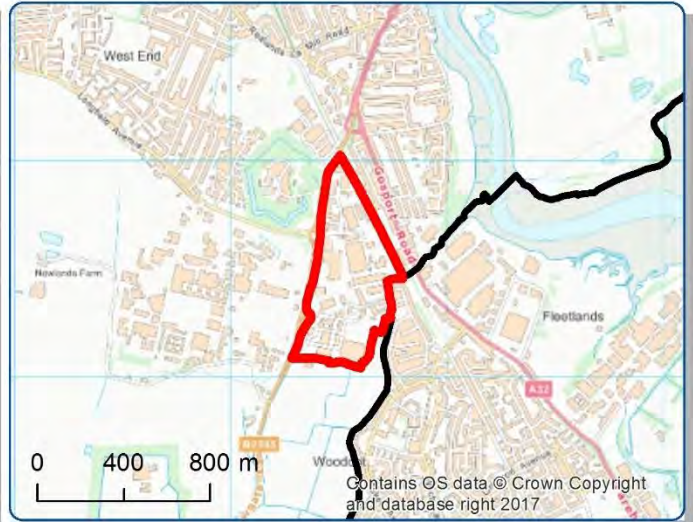
FAREHAM BOROUGH COUNCIL

SITE ID 74

NEWGATE LANE & SPEEDFIELDS PARK



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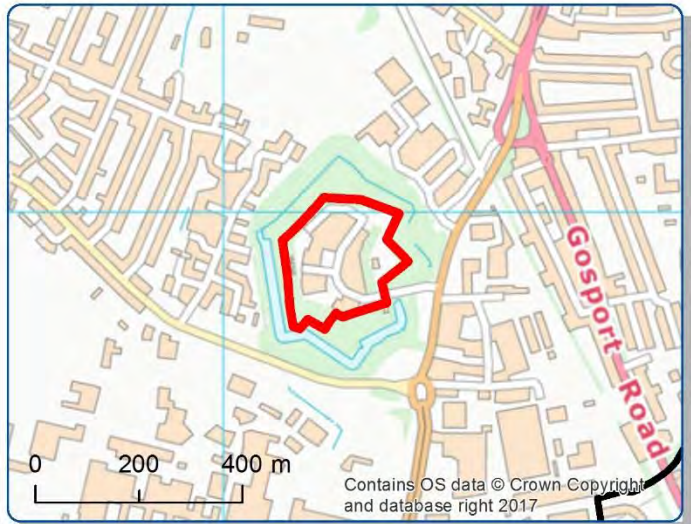
FAREHAM
BOROUGH COUNCIL

SITE ID 76

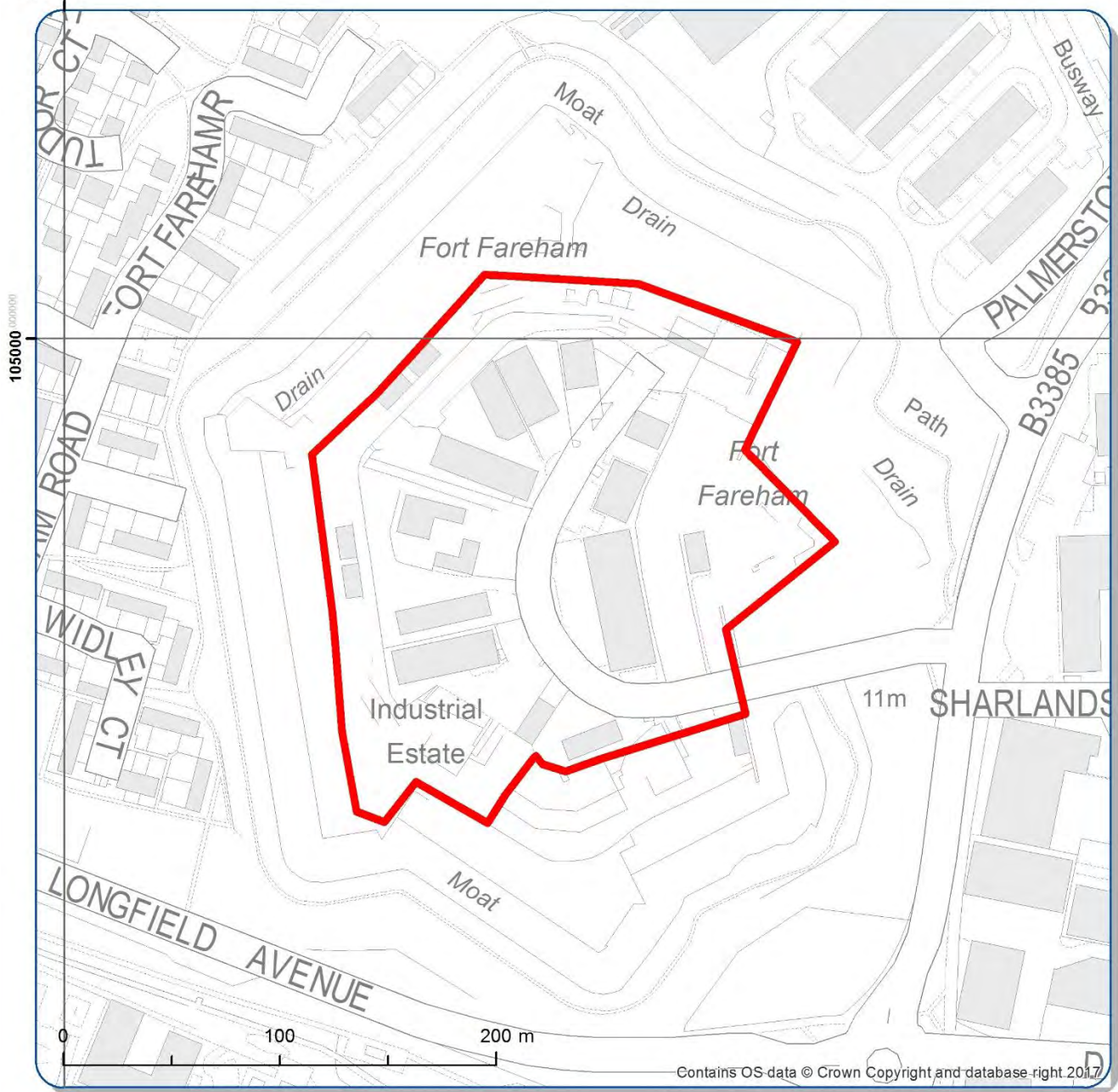
**FORT FAREHAM INDUSTRIAL
ESTATE**



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FAREHAM
BOROUGH COUNCIL

SITE ID 77

PALMERSTON BUSINESS PARK



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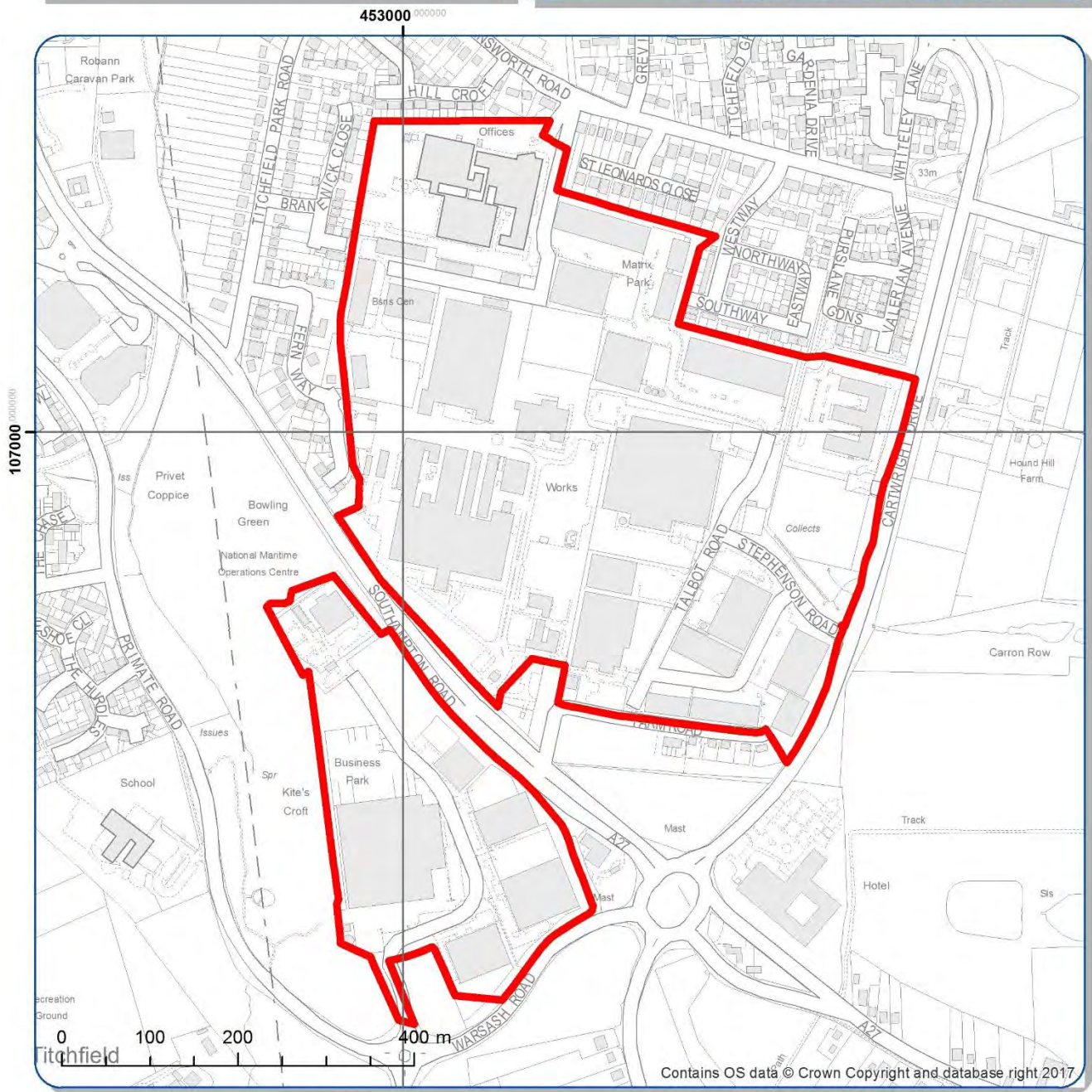
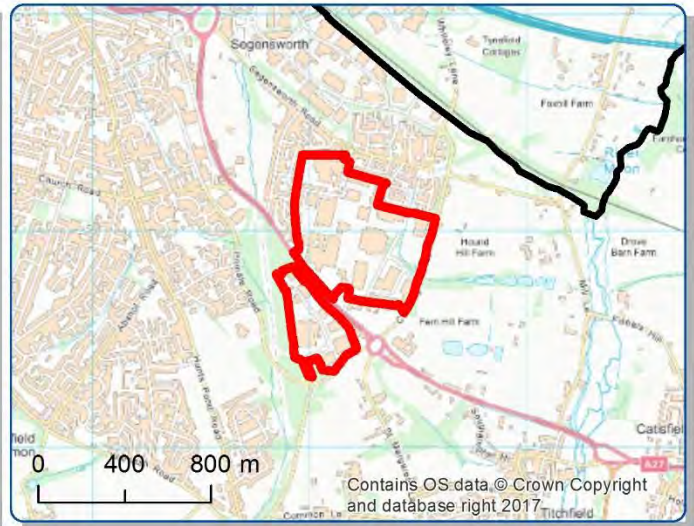
FAREHAM BOROUGH COUNCIL

SITE ID 78

SEGENSWORTH SOUTH & KITES CROFT



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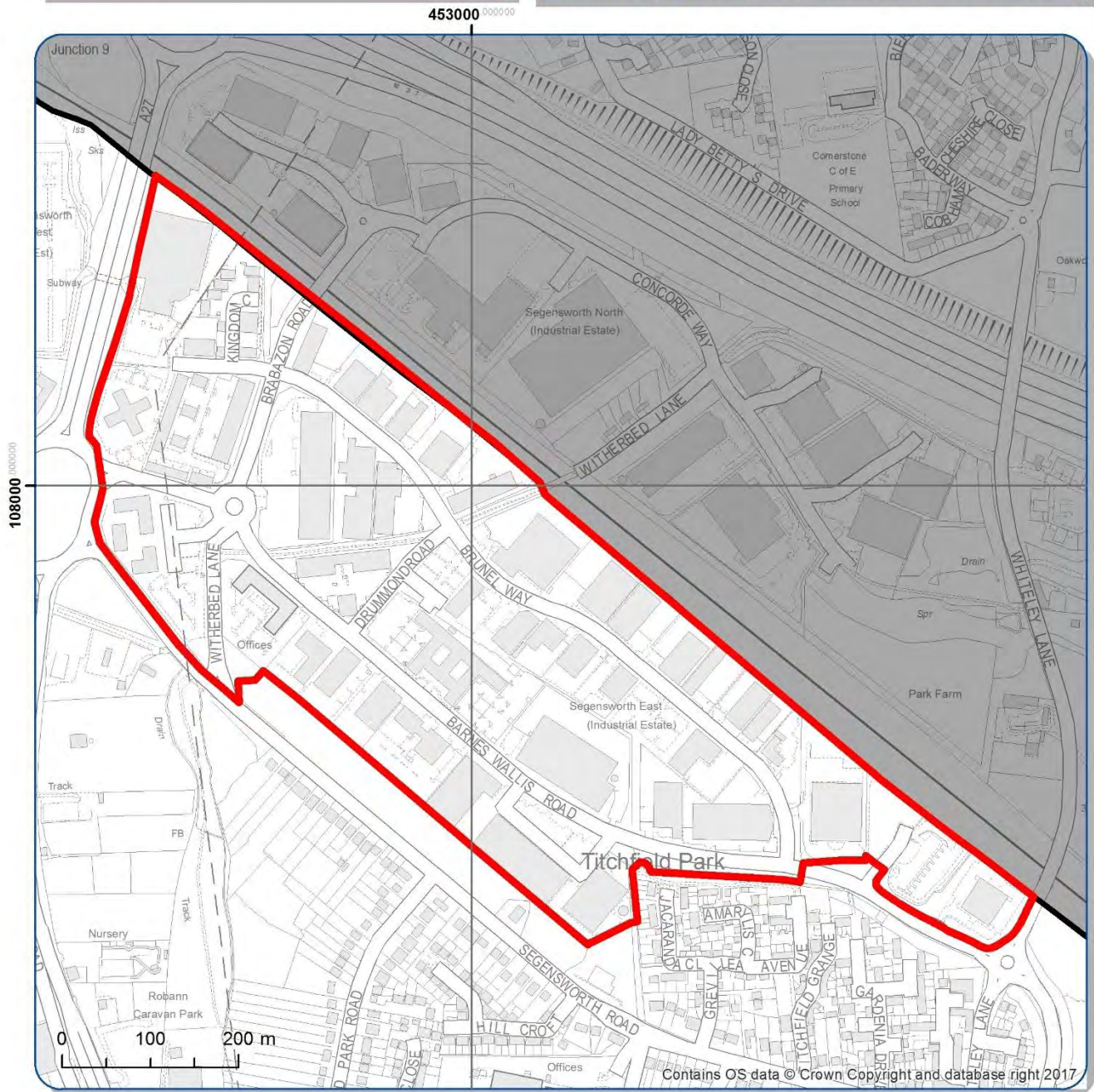
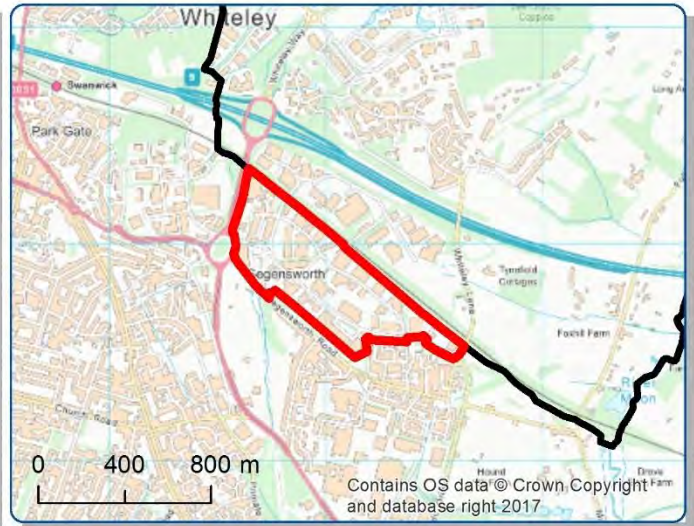
FAREHAM
BOROUGH COUNCIL

SITE ID 79

**SEGENSWORTH EAST
INDUSTRIAL ESTATE**



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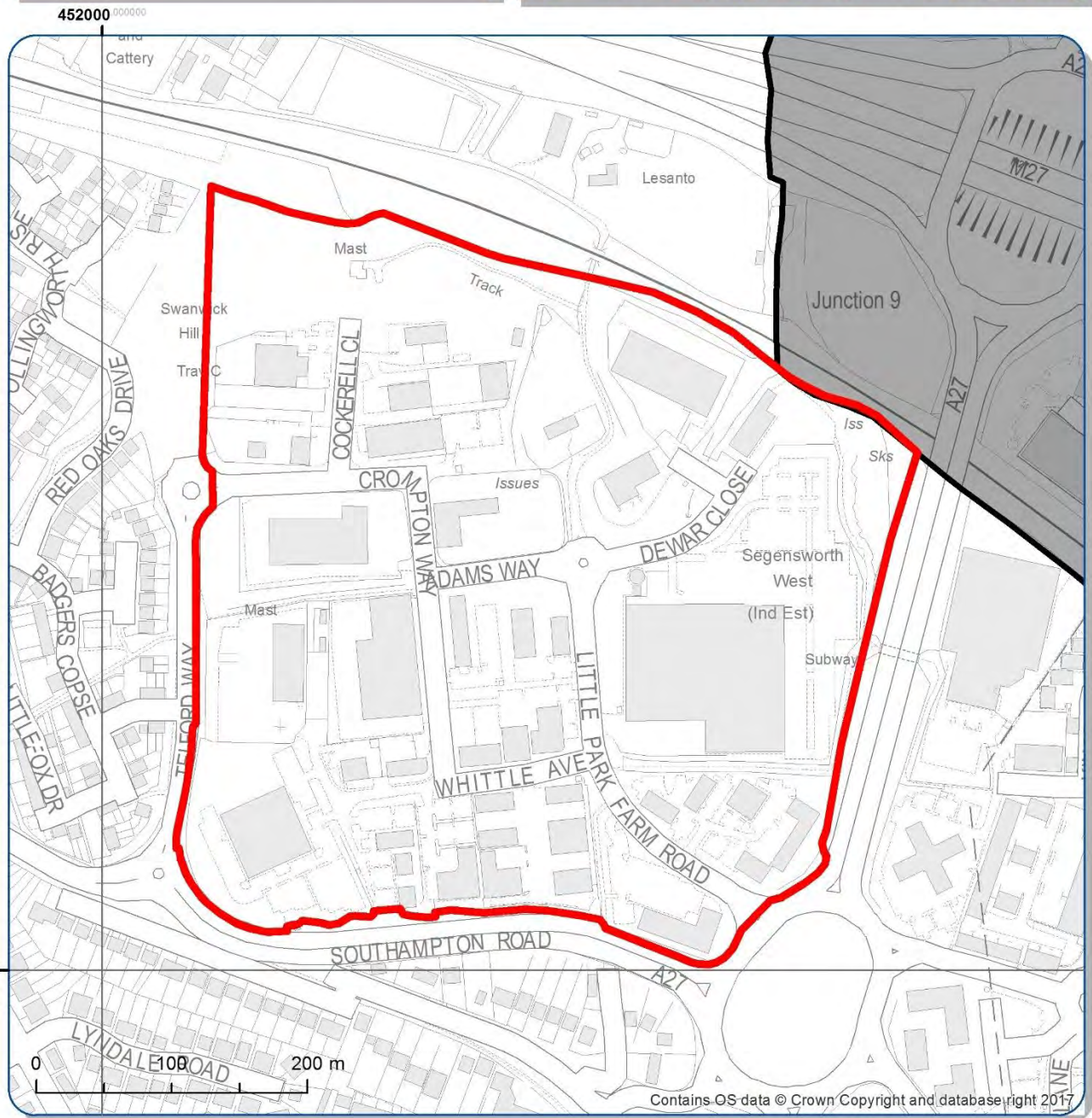
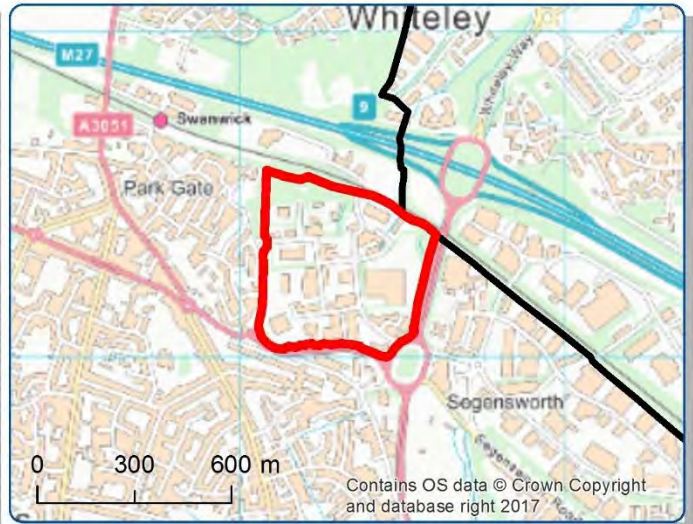
FAREHAM BOROUGH COUNCIL

SITE ID 80

SEGENSWORTH WEST INDUSTRIAL ESTATE



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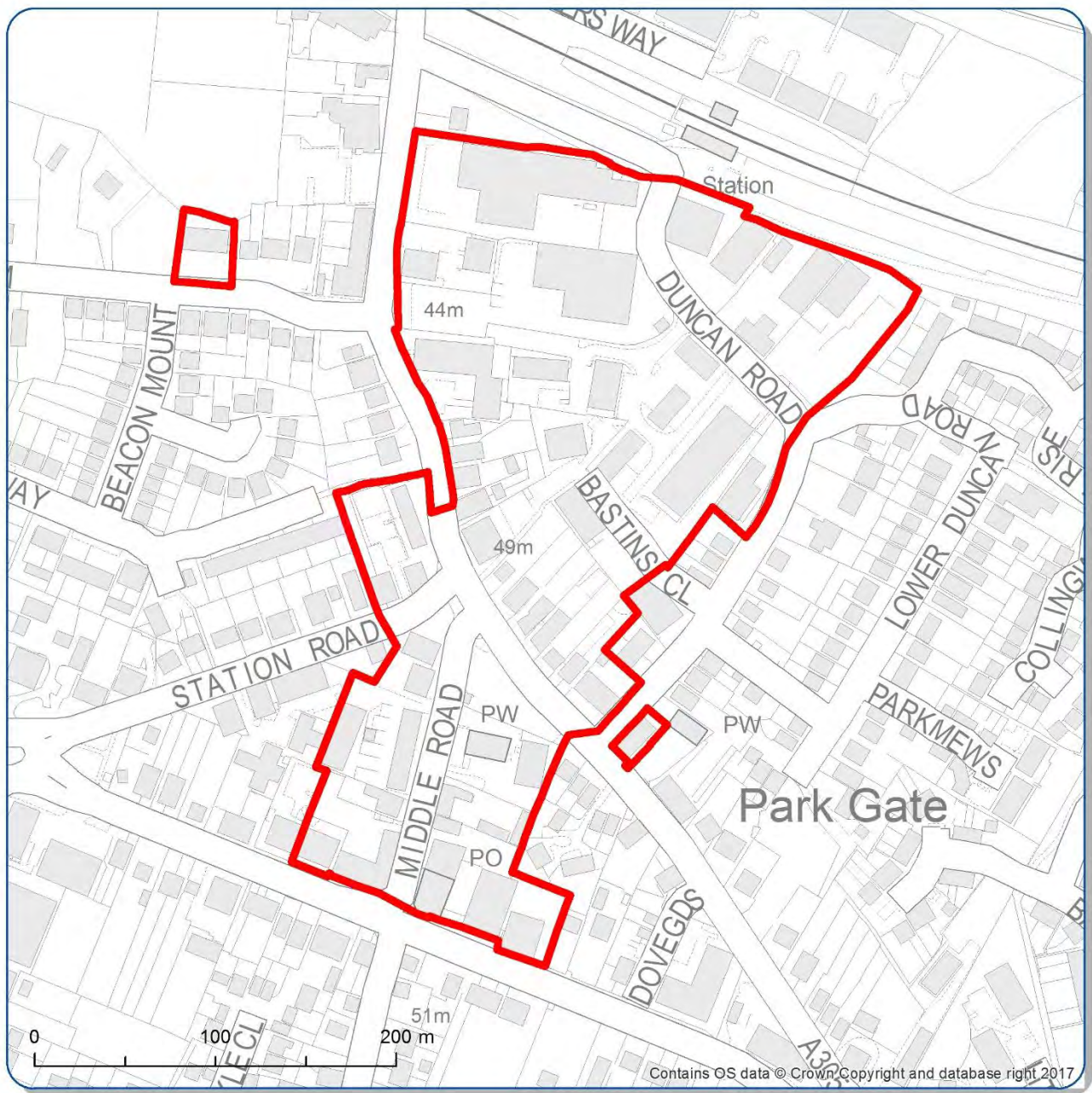
FAREHAM
BOROUGH COUNCIL

SITE ID 81

PARK GATE CENTRE & NORTH



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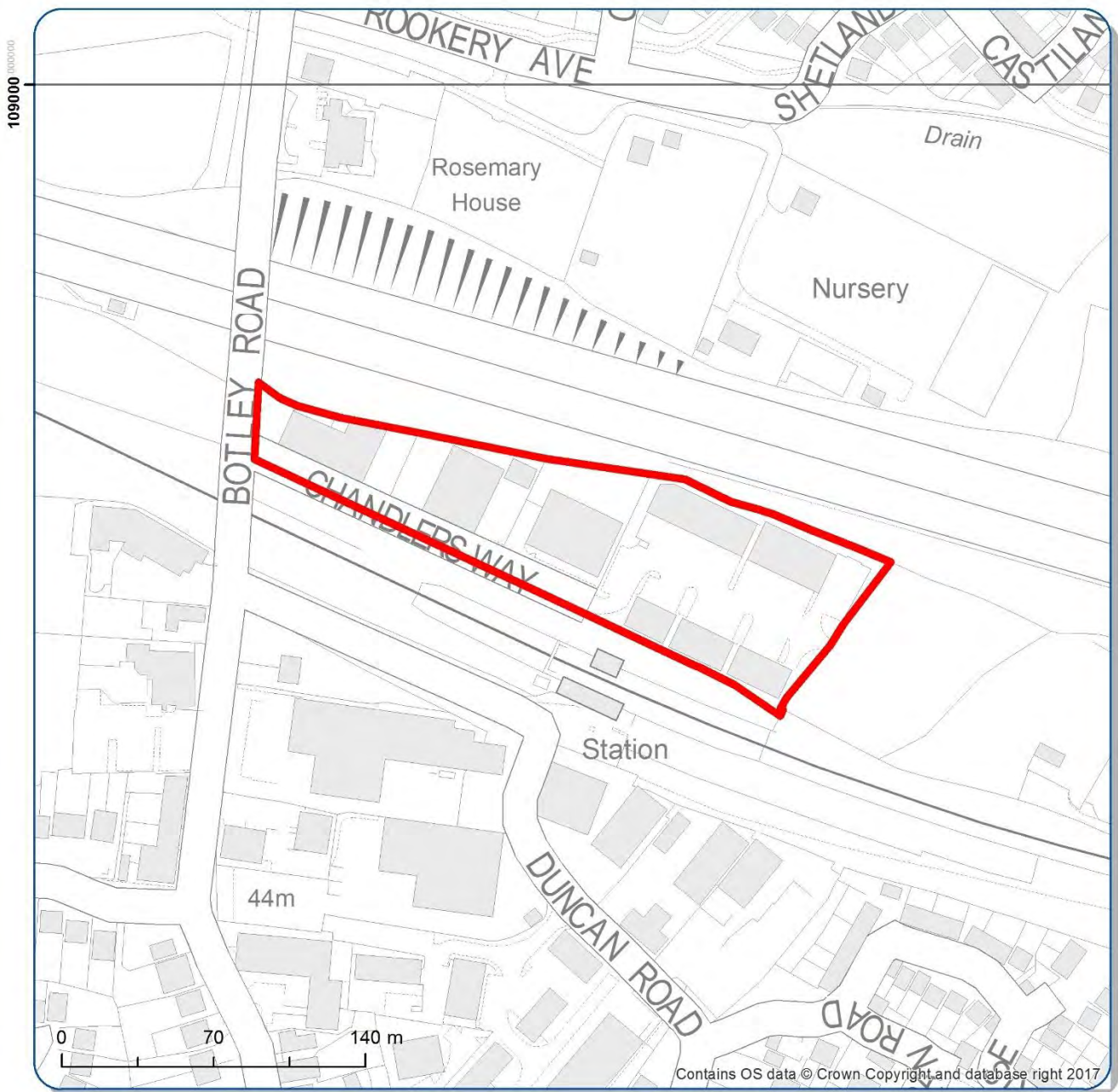
FAREHAM
BOROUGH COUNCIL

SITE ID 82

PARK GATE BUSINESS CENTRE



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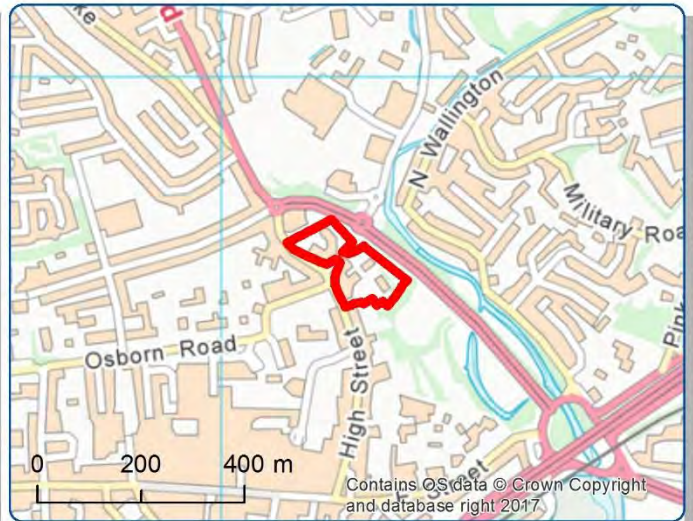
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BOROUGH COUNCIL

SITE ID 84

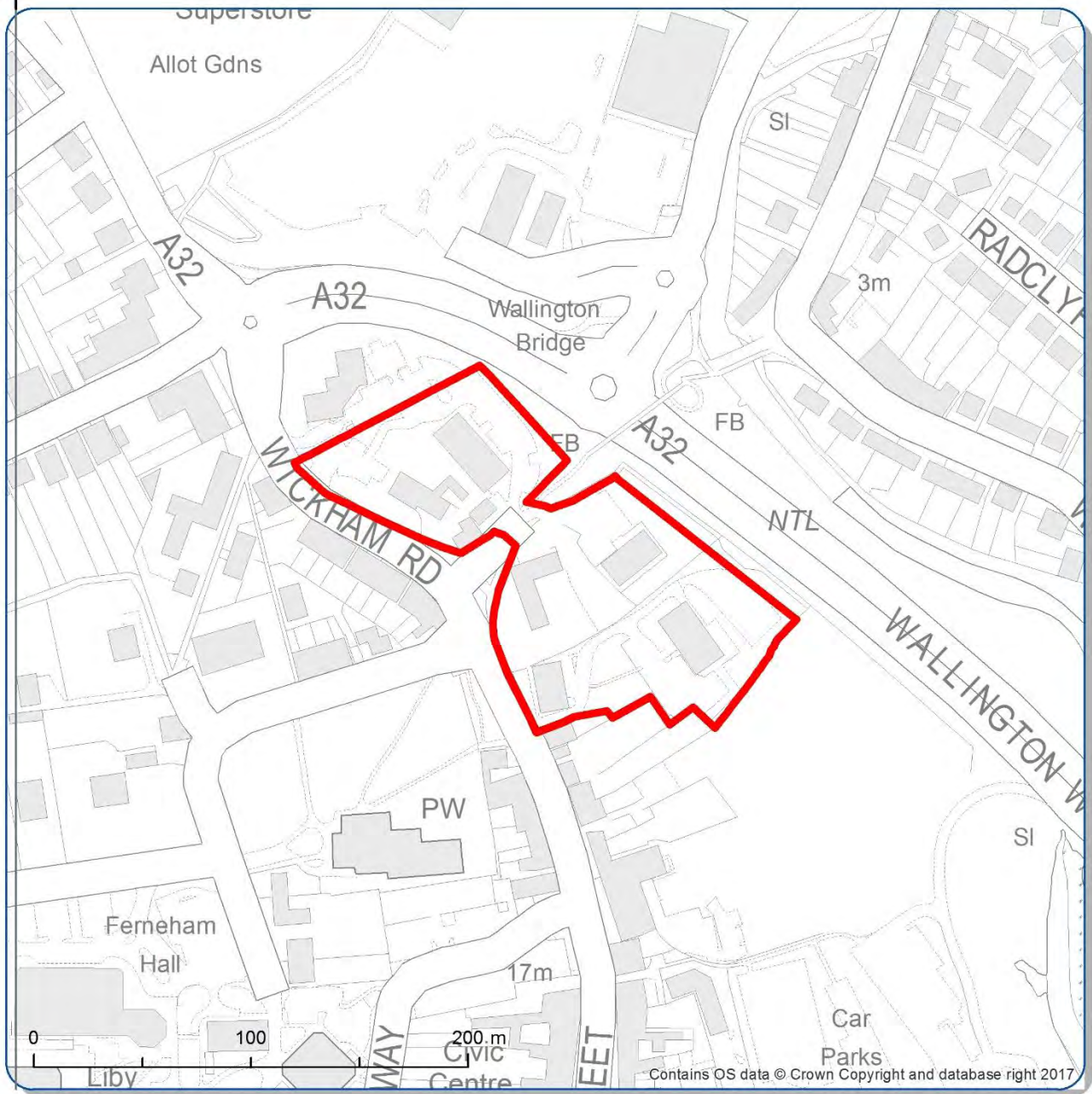
**FAREHAM POINT, WICKHAM
ROAD & NORTH END OF HIGH
STREET**



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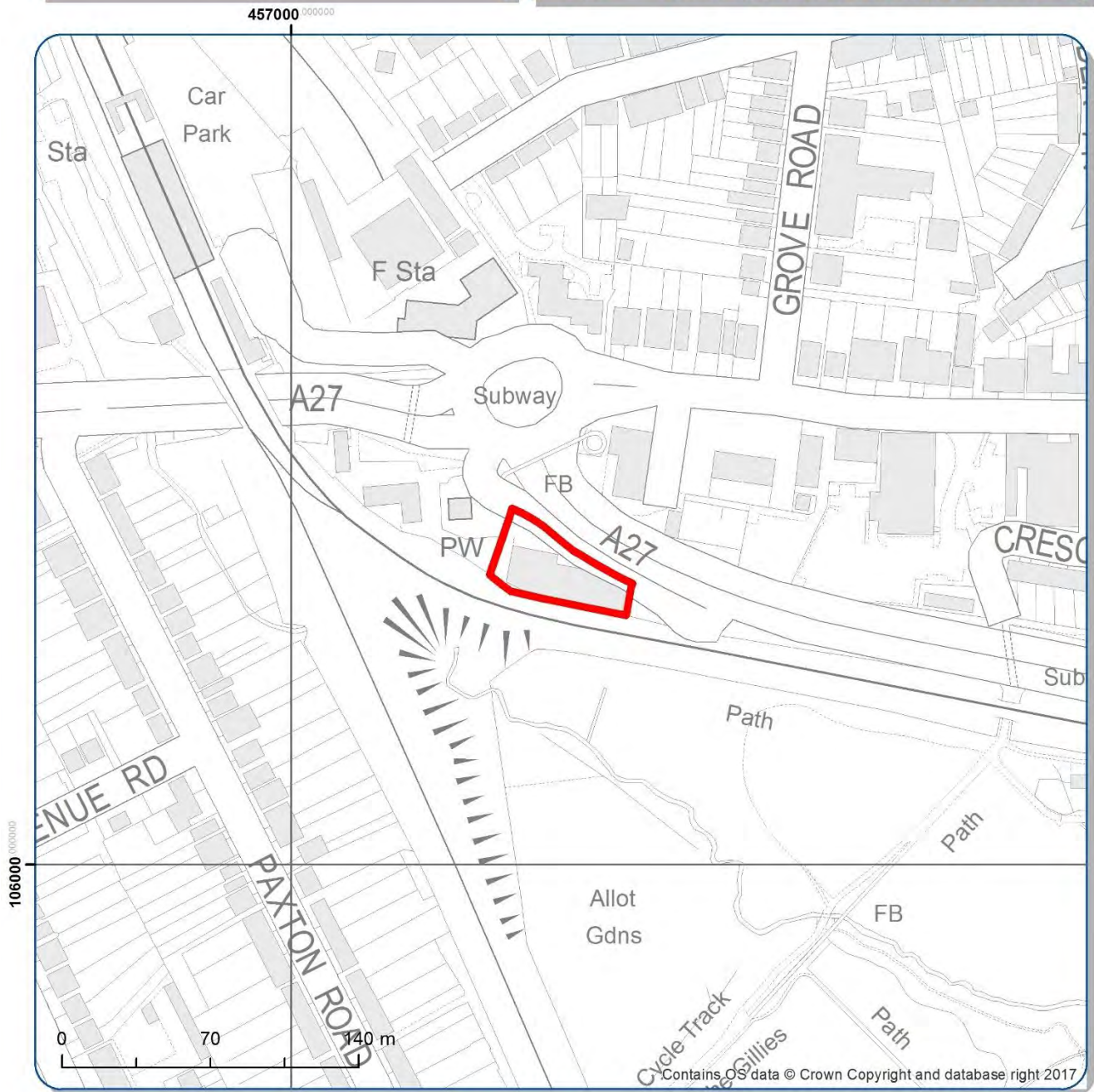
FAREHAM
BOROUGH COUNCIL

SITE ID 87

**280-282 (UTP) WEST STREET,
FAREHAM**



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FAREHAM
BOROUGH COUNCIL

SITE ID 90

BOATYARD INDUSTRIAL ESTATE



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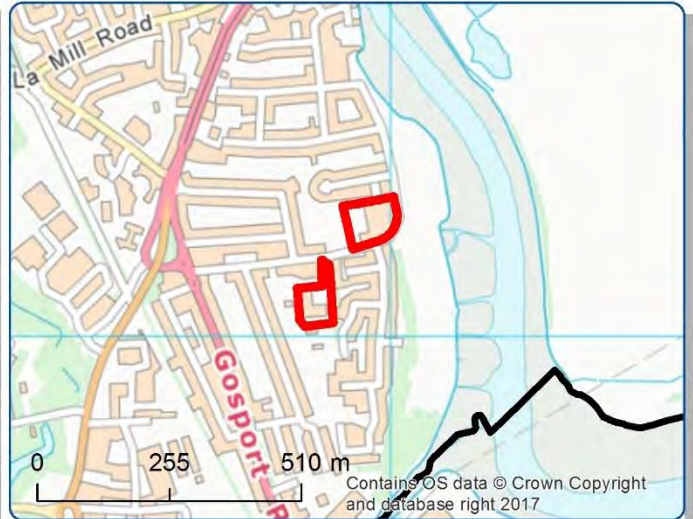
FAREHAM
BOROUGH COUNCIL

SITE ID 92

**SALTERNS & DELTA BUSINESS
PARK**



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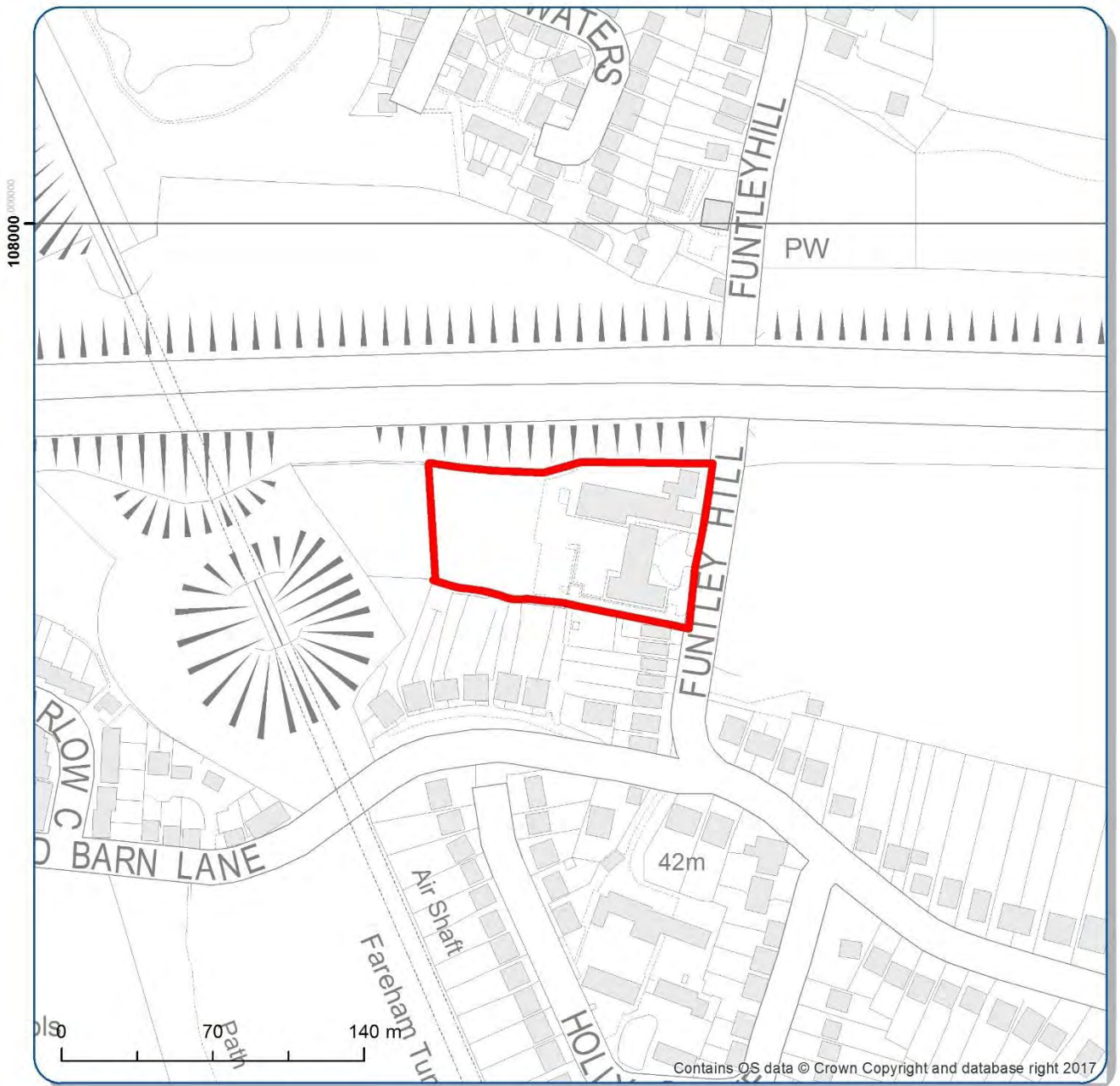
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BOROUGH COUNCIL

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FUNTLEY COURT



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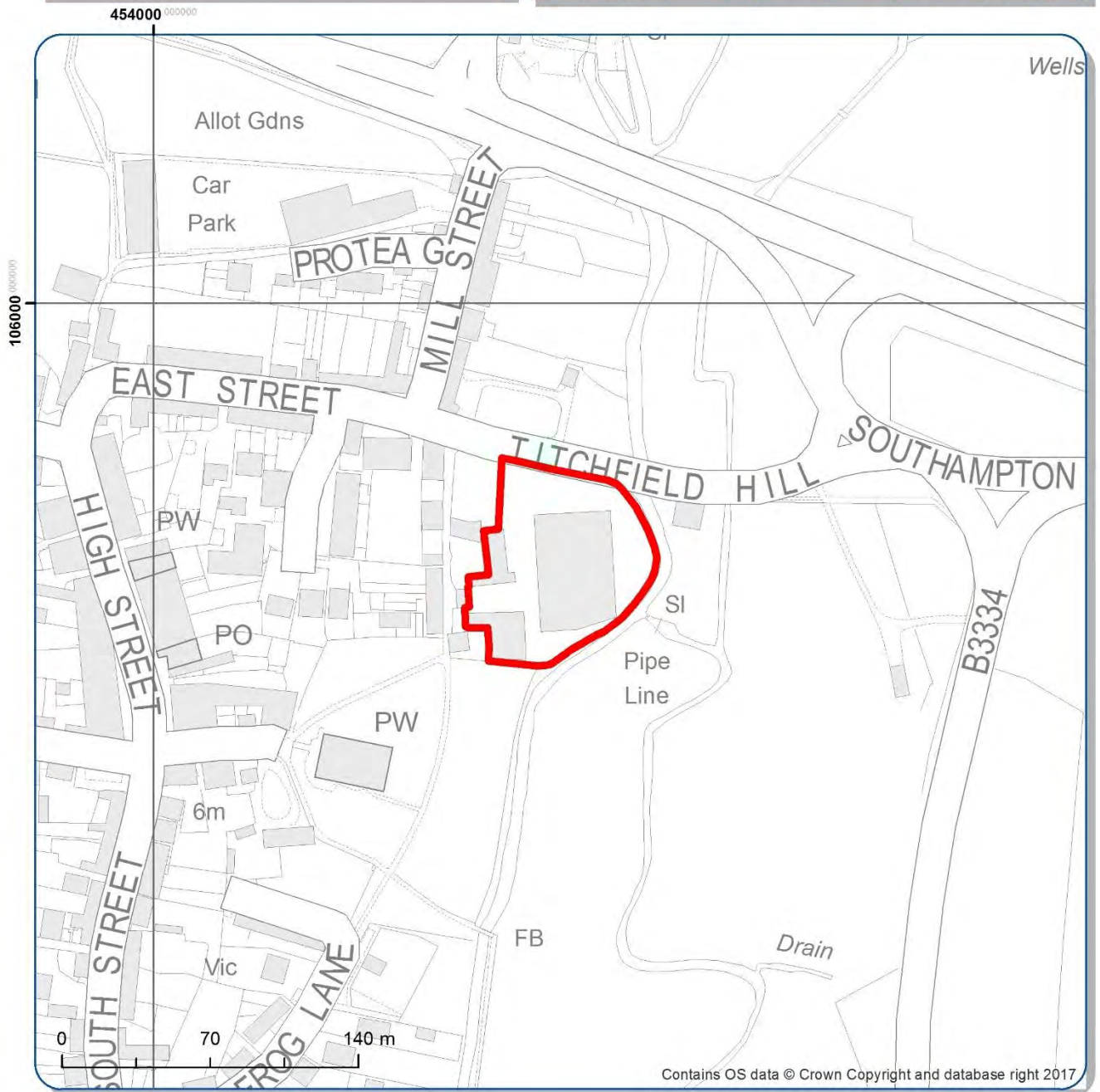
FAREHAM
BOROUGH COUNCIL

SITE ID 96

THE TANNERIES



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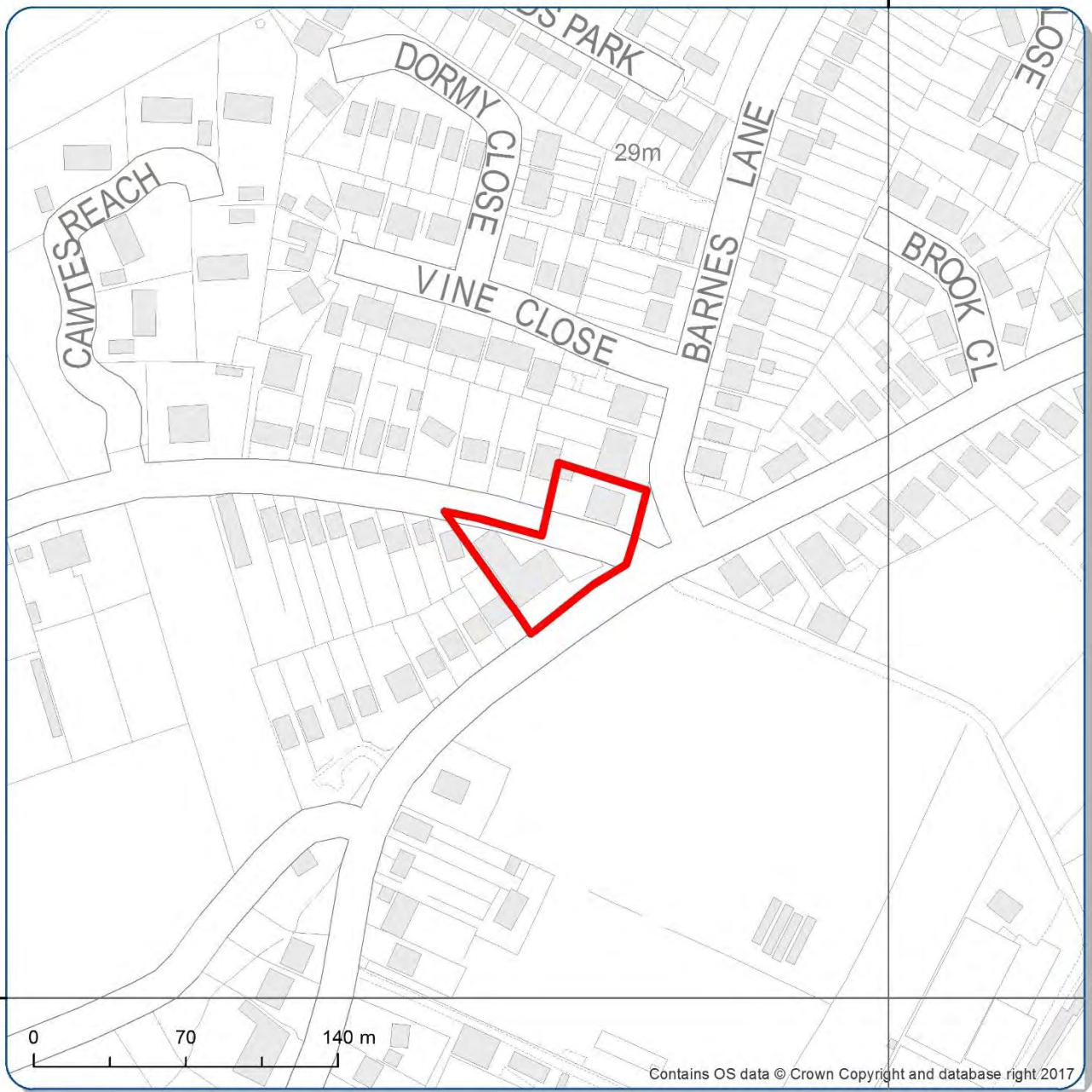
BROOK AVENUE/BROOK LANE



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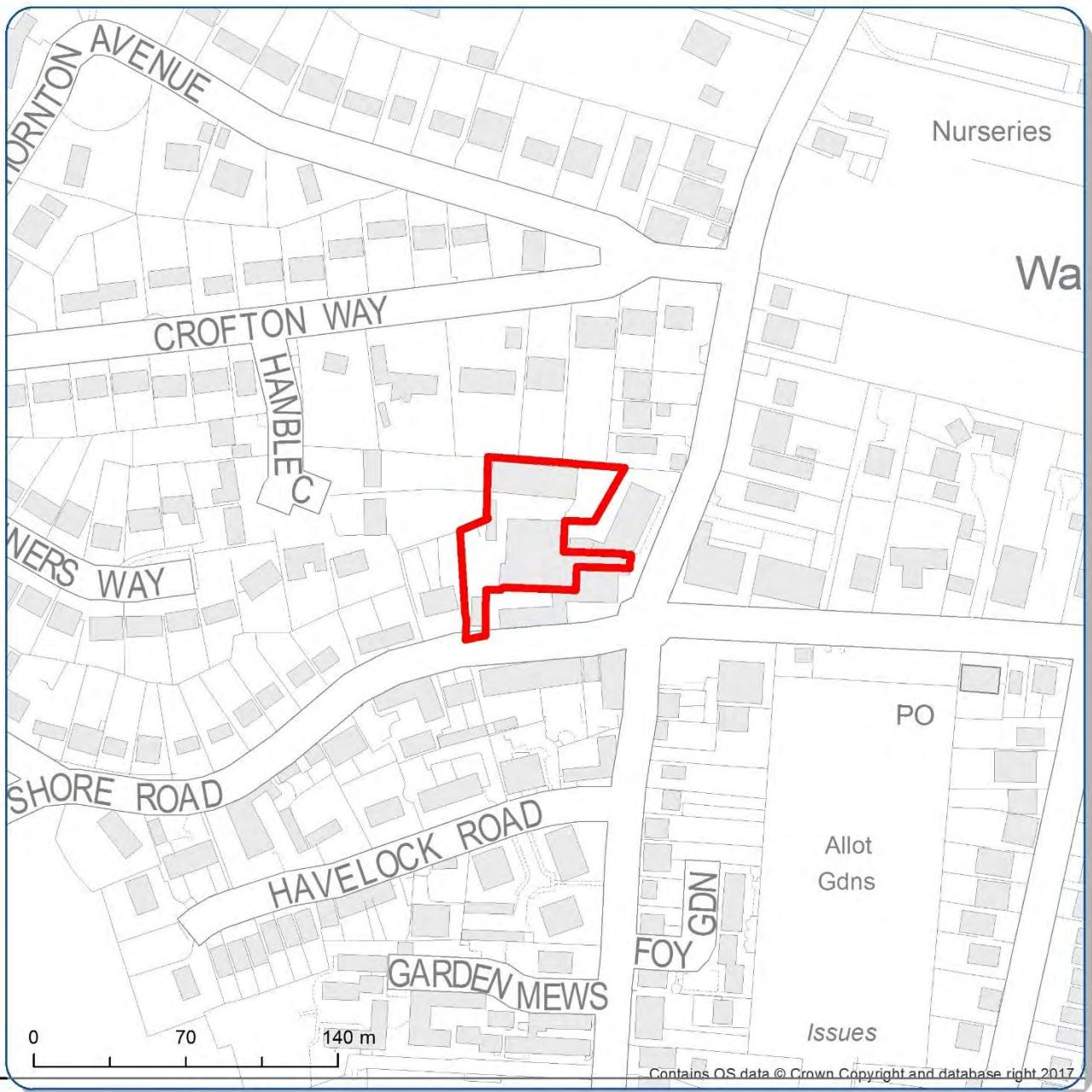
FAREHAM
BOROUGH COUNCIL

SITE ID 99

WARSASH VILLAGE CENTRE



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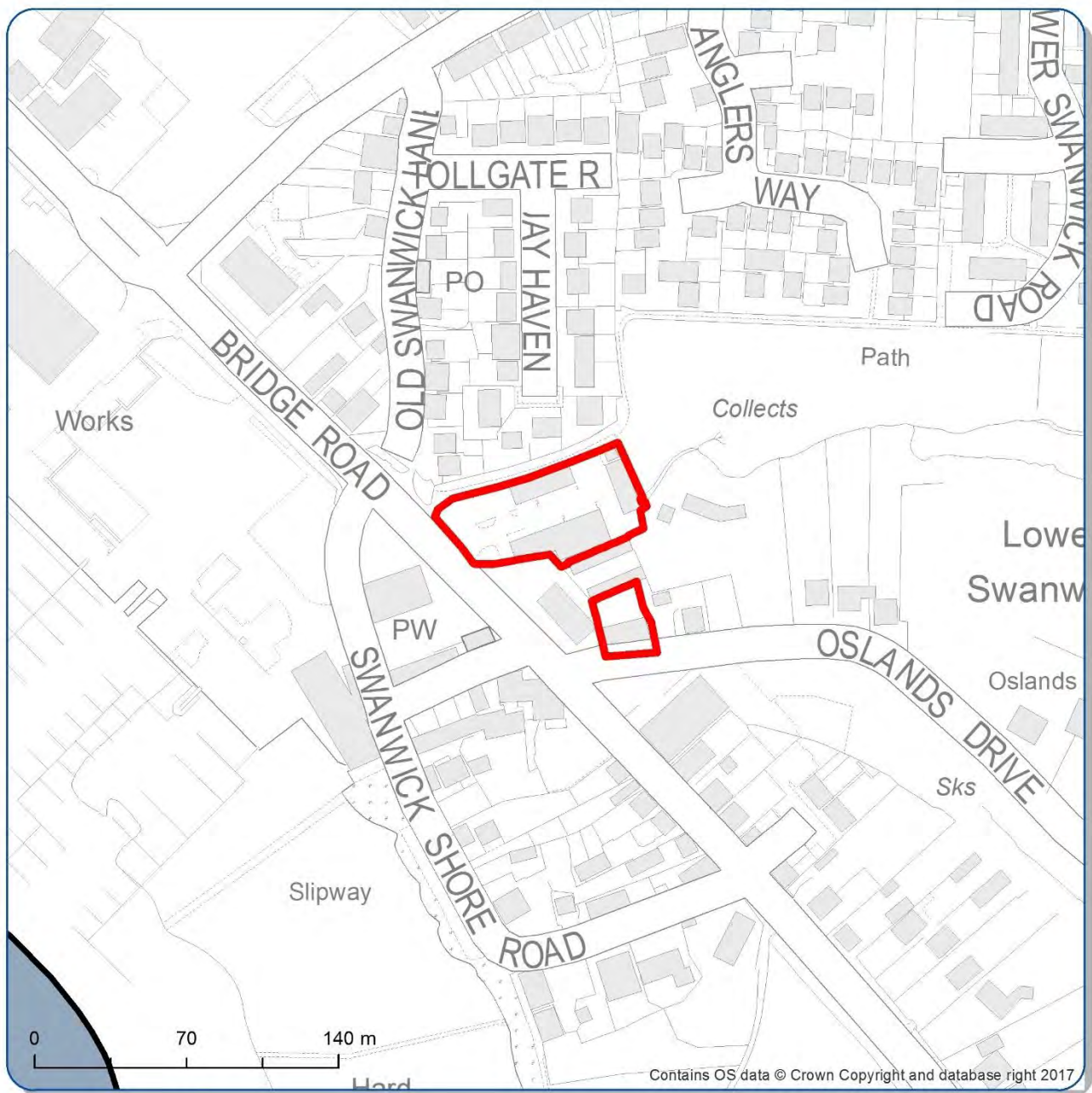
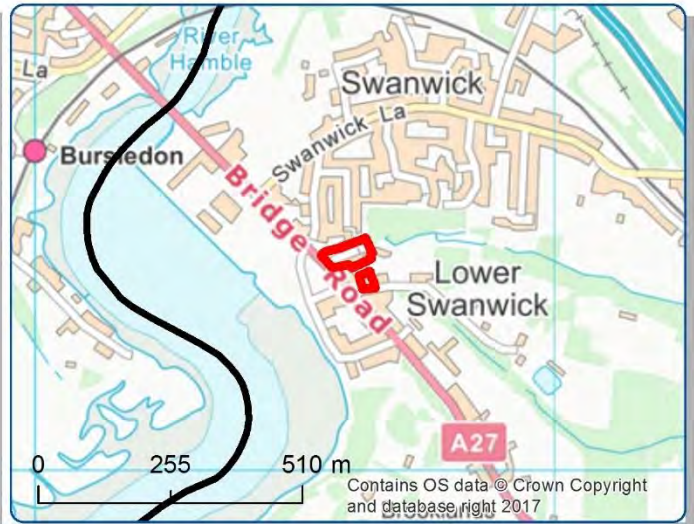
FAREHAM
BOROUGH COUNCIL

SITE ID 100

**SWANWICK BUSINESS PARK &
OSLANDS COURT**



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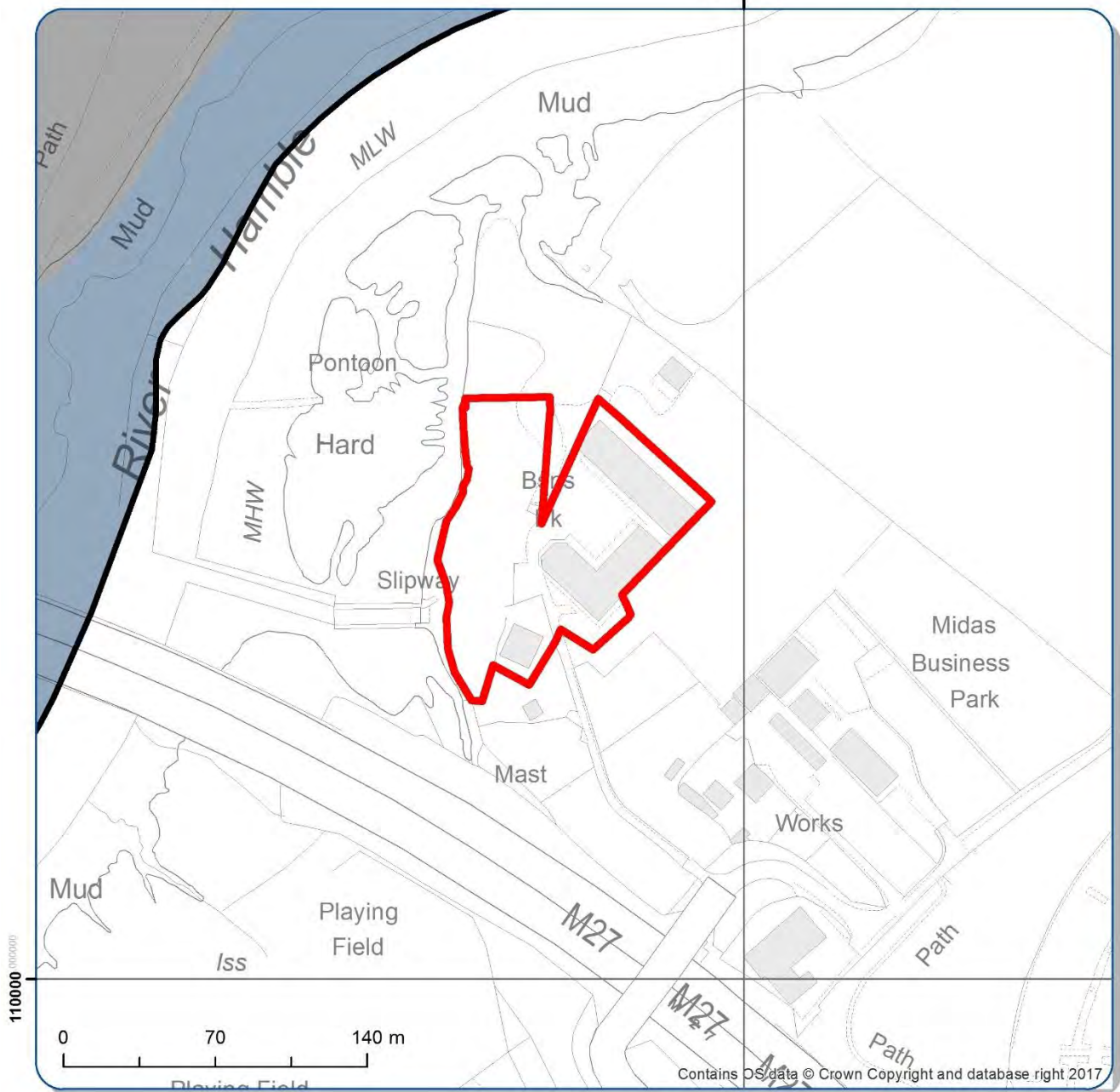
FAREHAM
BOROUGH COUNCIL

SITE ID 102

**EASTLANDS BOAT YARD AND
BUSINESS PARK**



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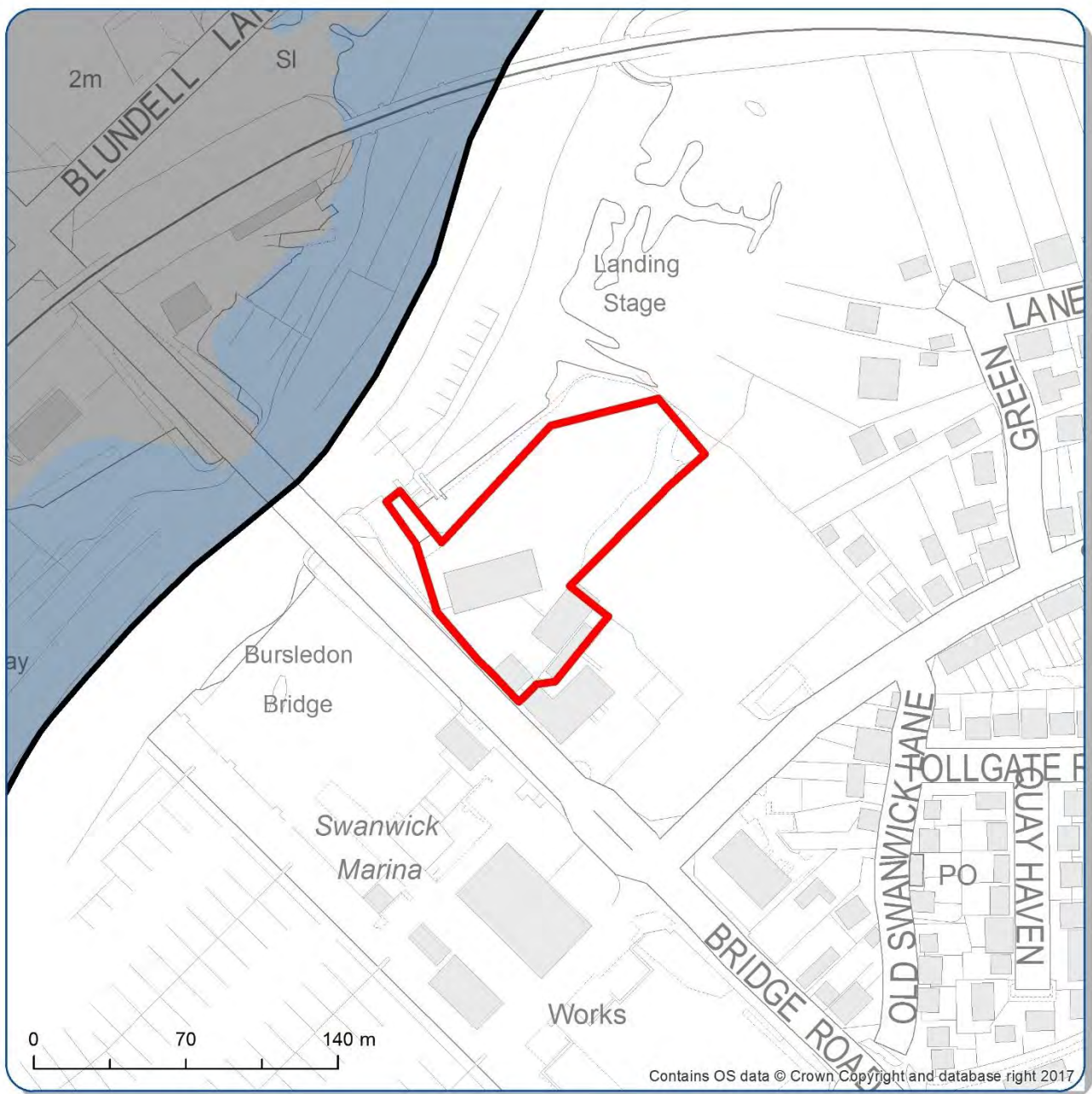
FAREHAM
BOROUGH COUNCIL

SITE ID 103

RK MARINE



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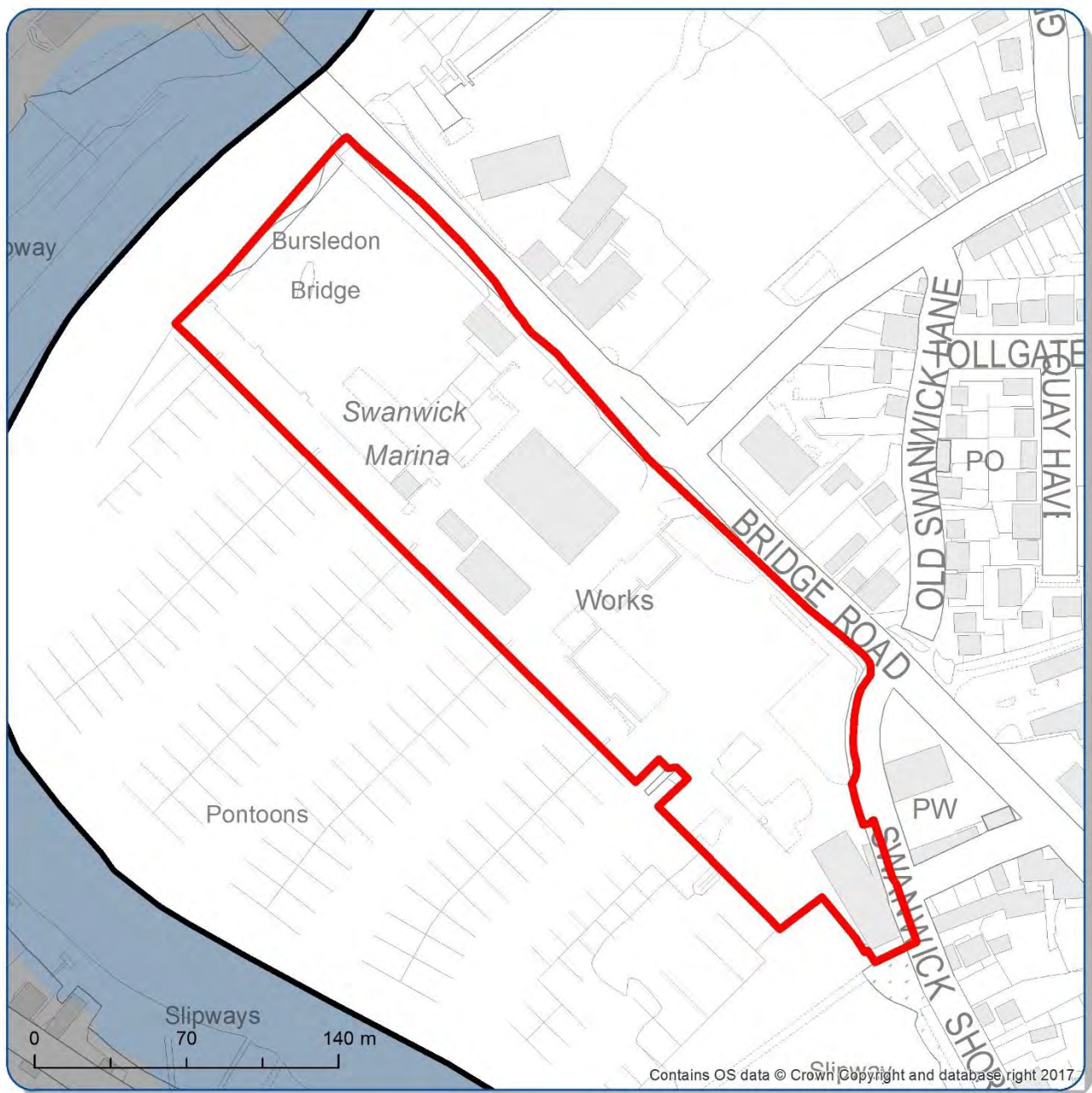
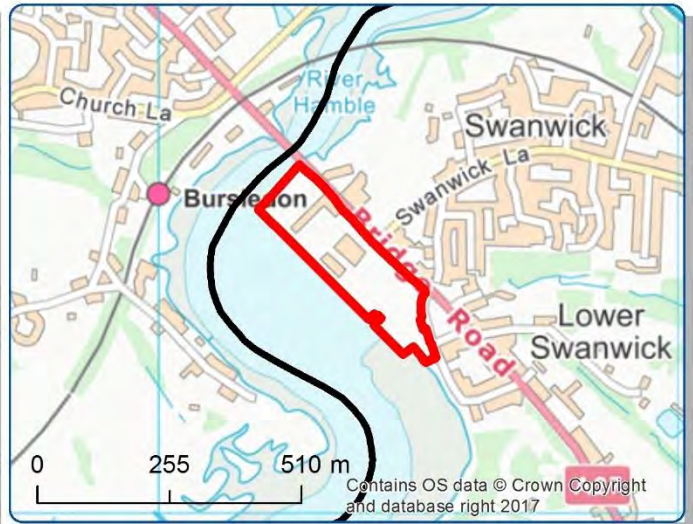
FAREHAM
BOROUGH COUNCIL

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SWANWICK MARINA



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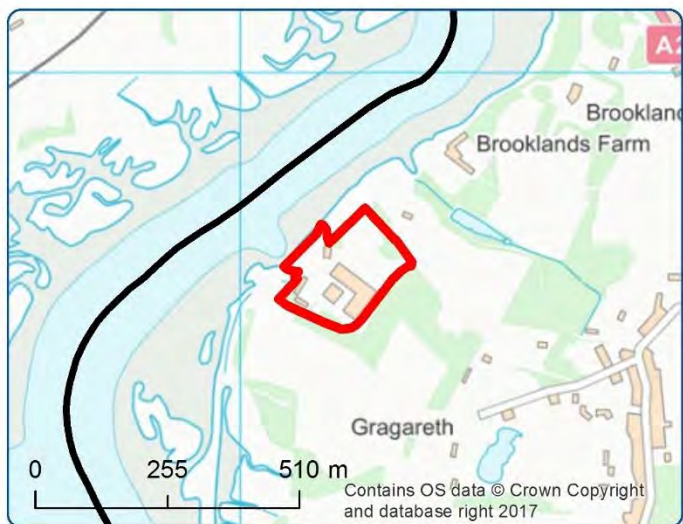
FAREHAM
BOROUGH COUNCIL

SITE ID 105

UNIVERSAL SHIPYARD



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BOROUGH COUNCIL

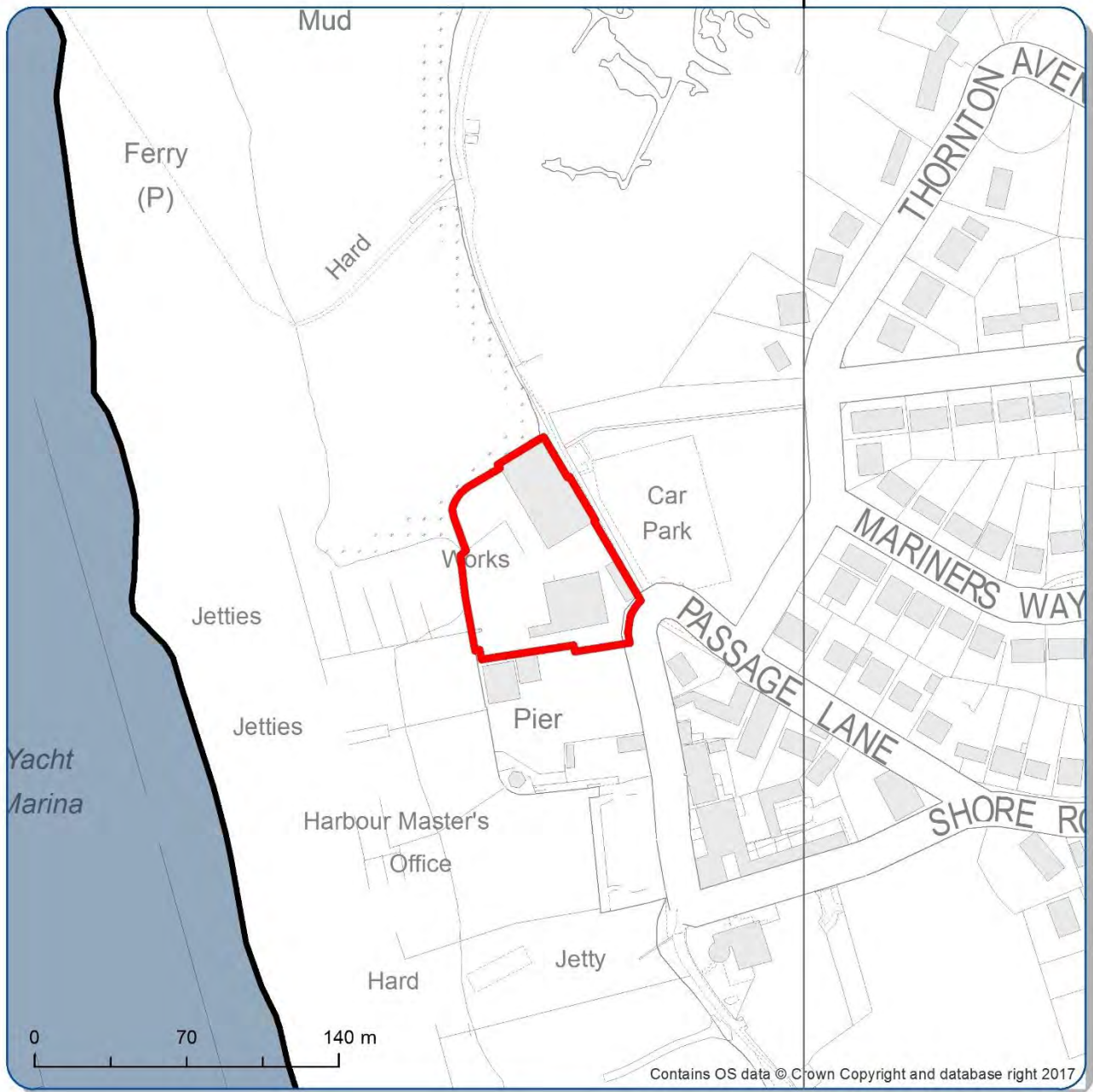
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STONE PIER YARD



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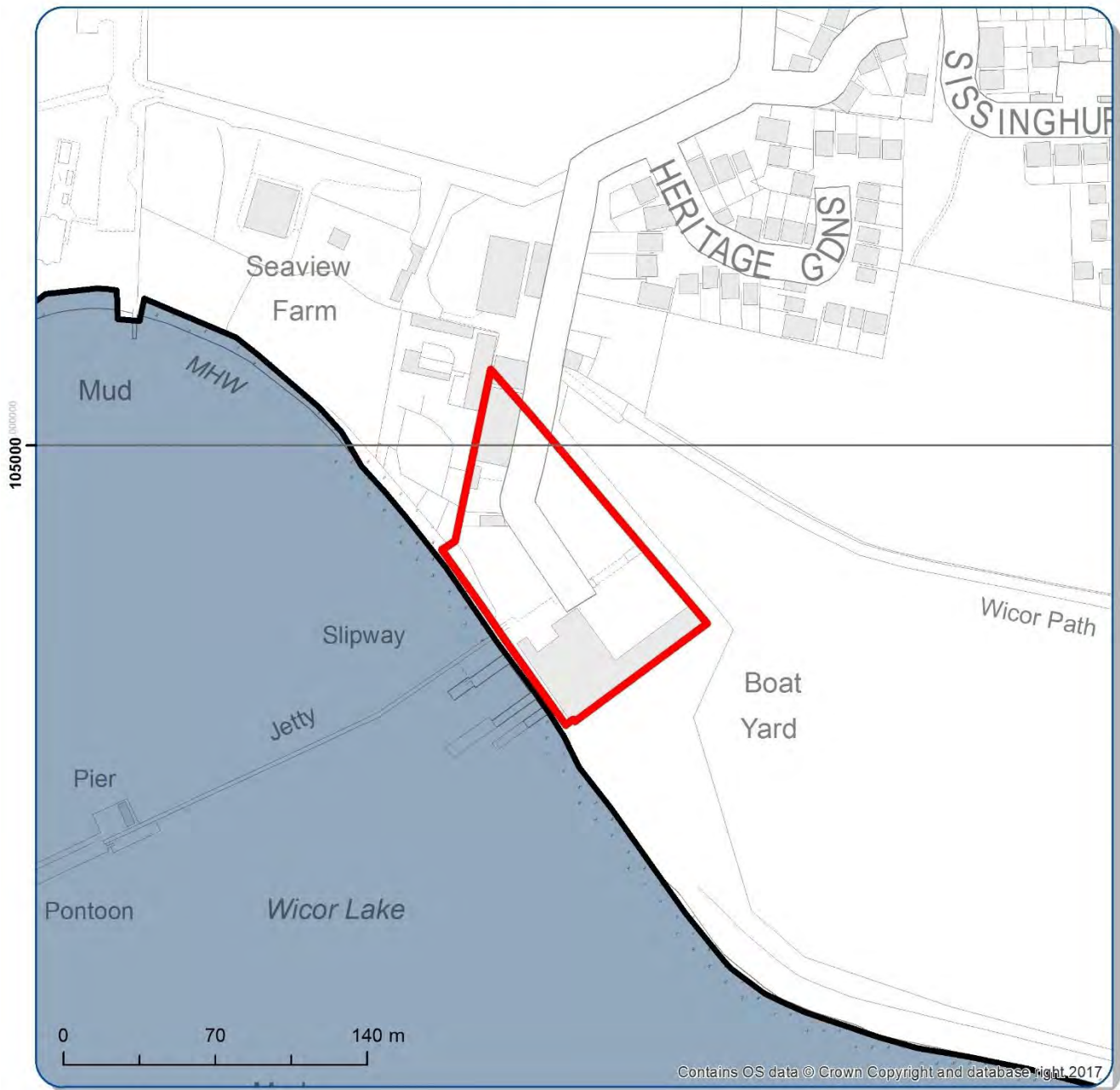
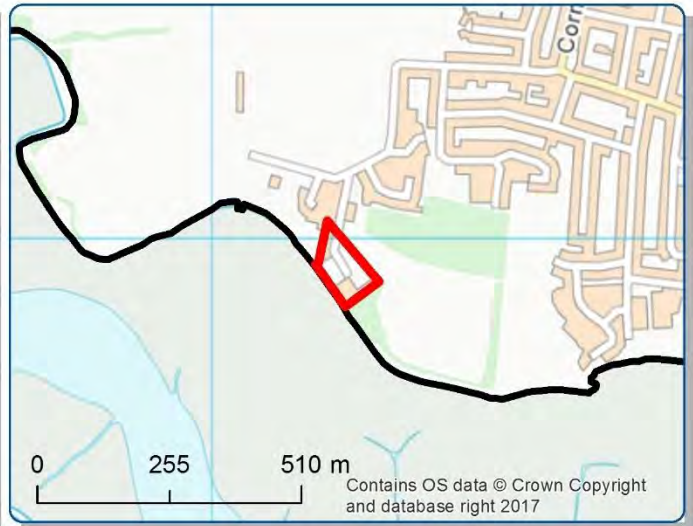
FAREHAM
BOROUGH COUNCIL

SITE ID 107

WICOR MARINE



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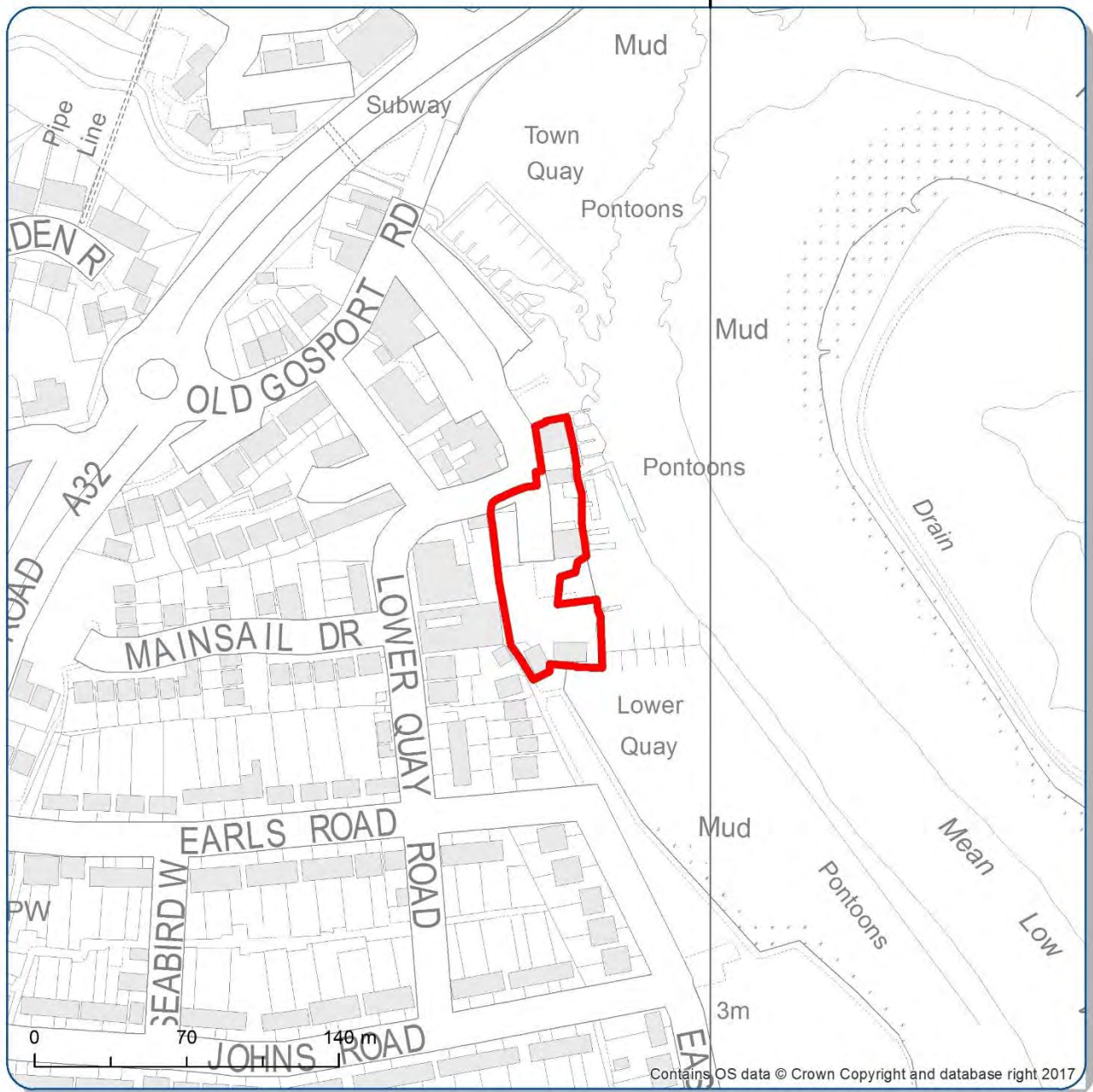
FAREHAM
BOROUGH COUNCIL

SITE ID 108

LOWER QUAY BOAT YARD



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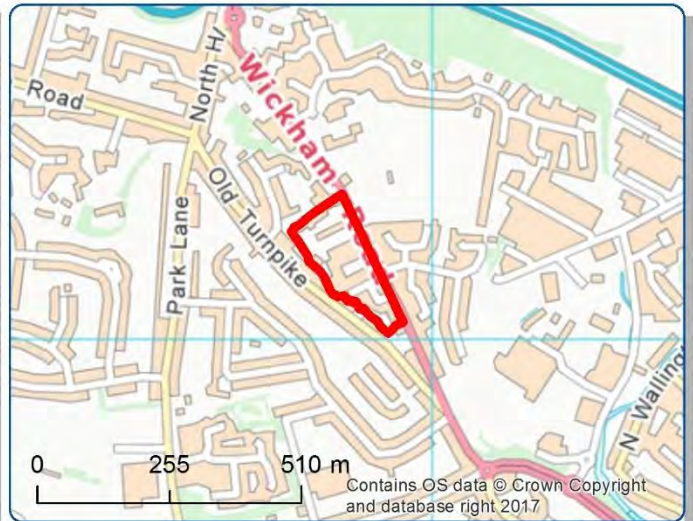
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SITE ID 126

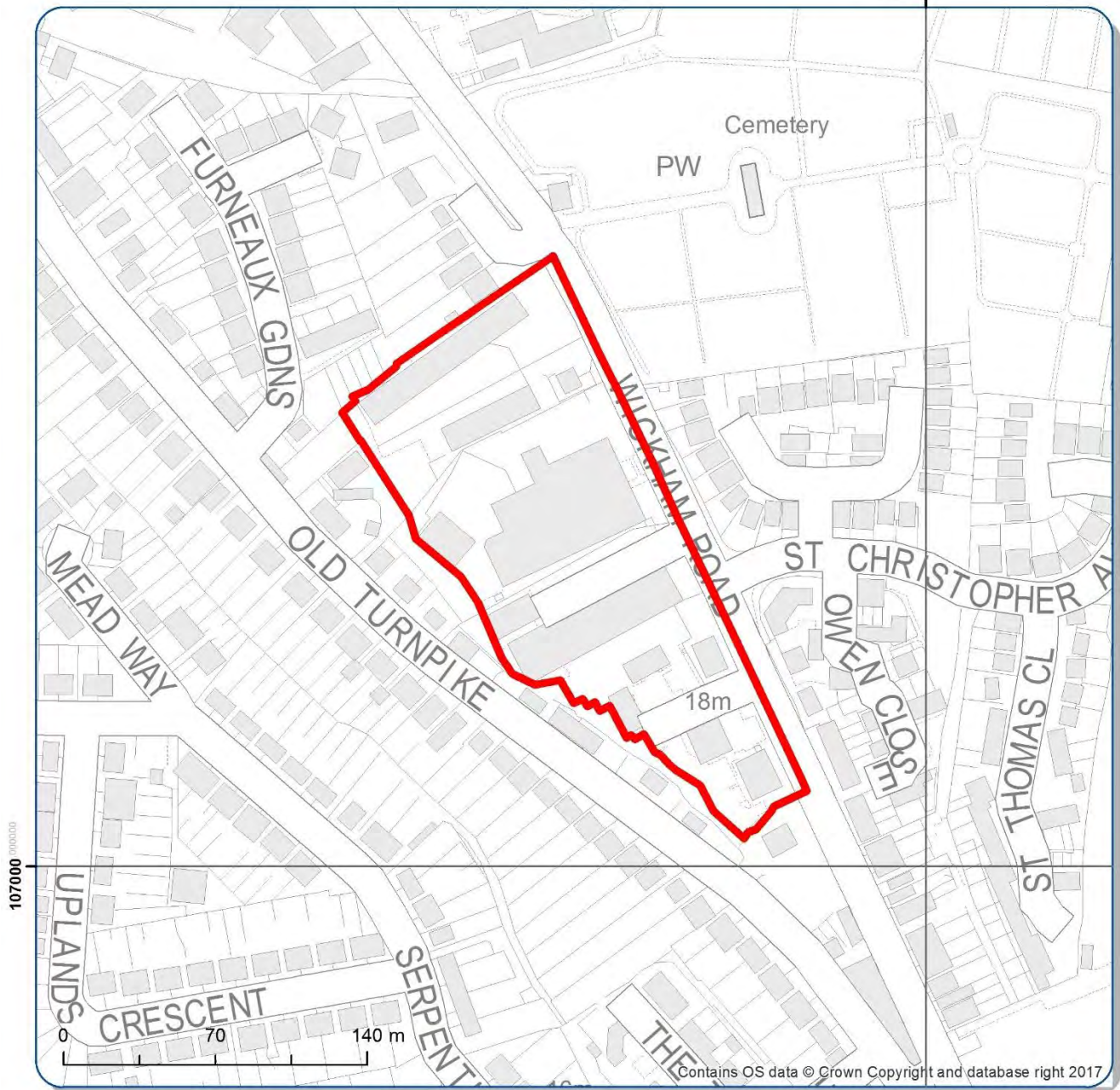
**KILN ACRE, WICKHAM ROAD,
FAREHAM**



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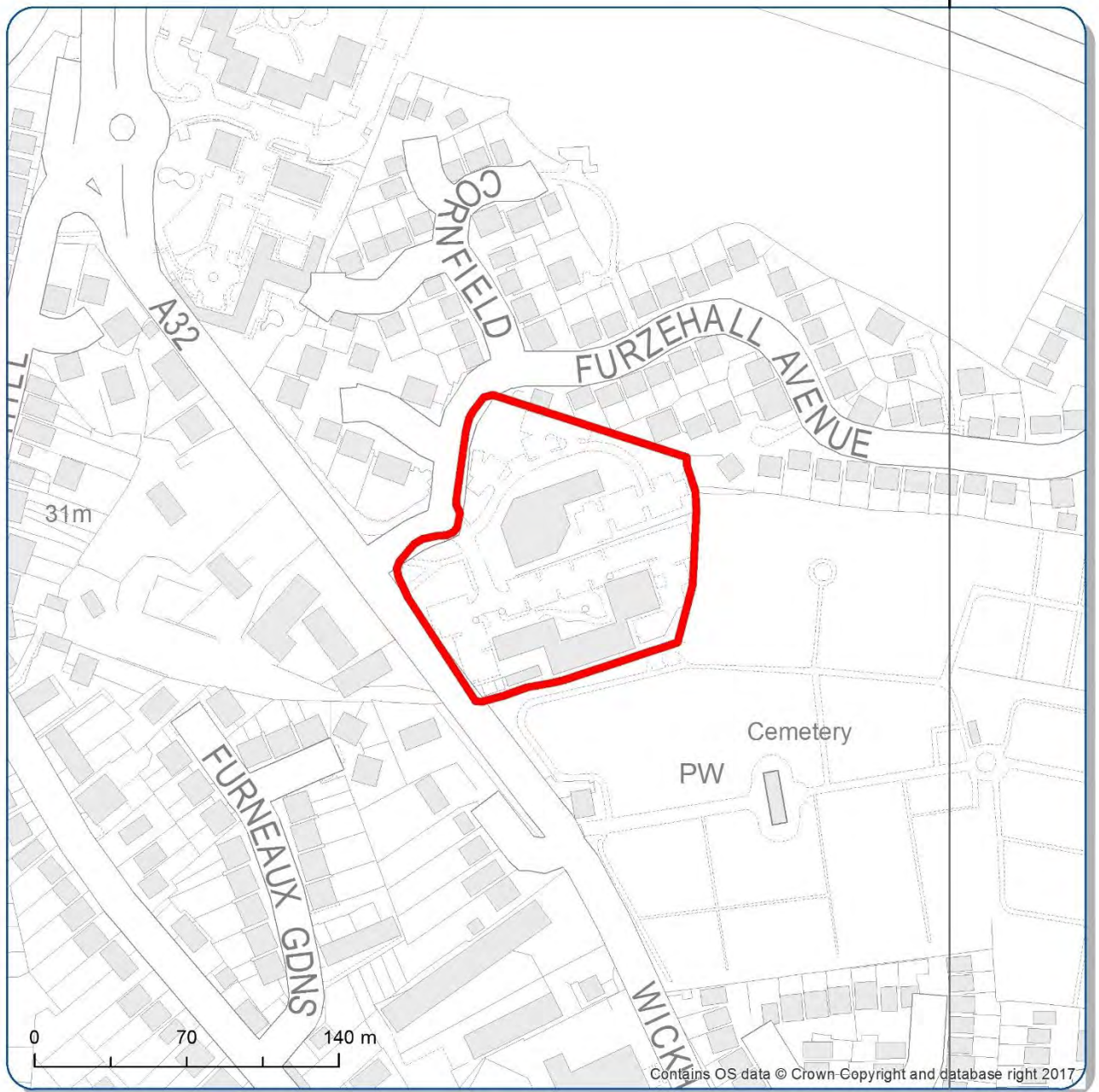
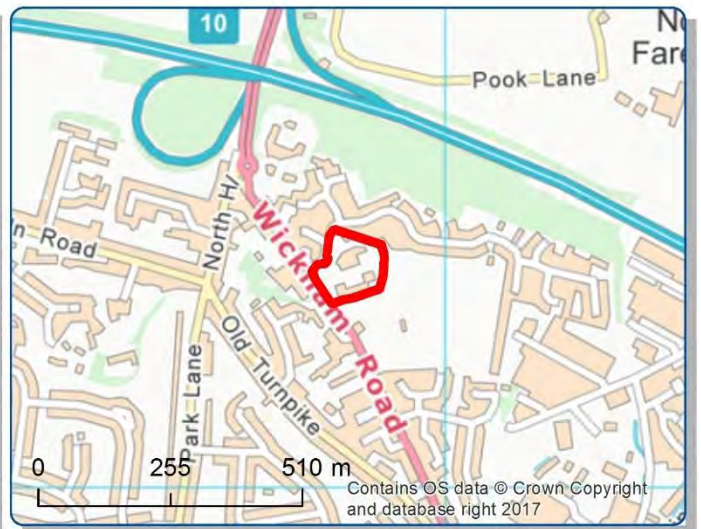
FAREHAM
BOROUGH COUNCIL

SITE ID 127

**PARKWAY, WICKHAM ROAD,
FAREHAM**



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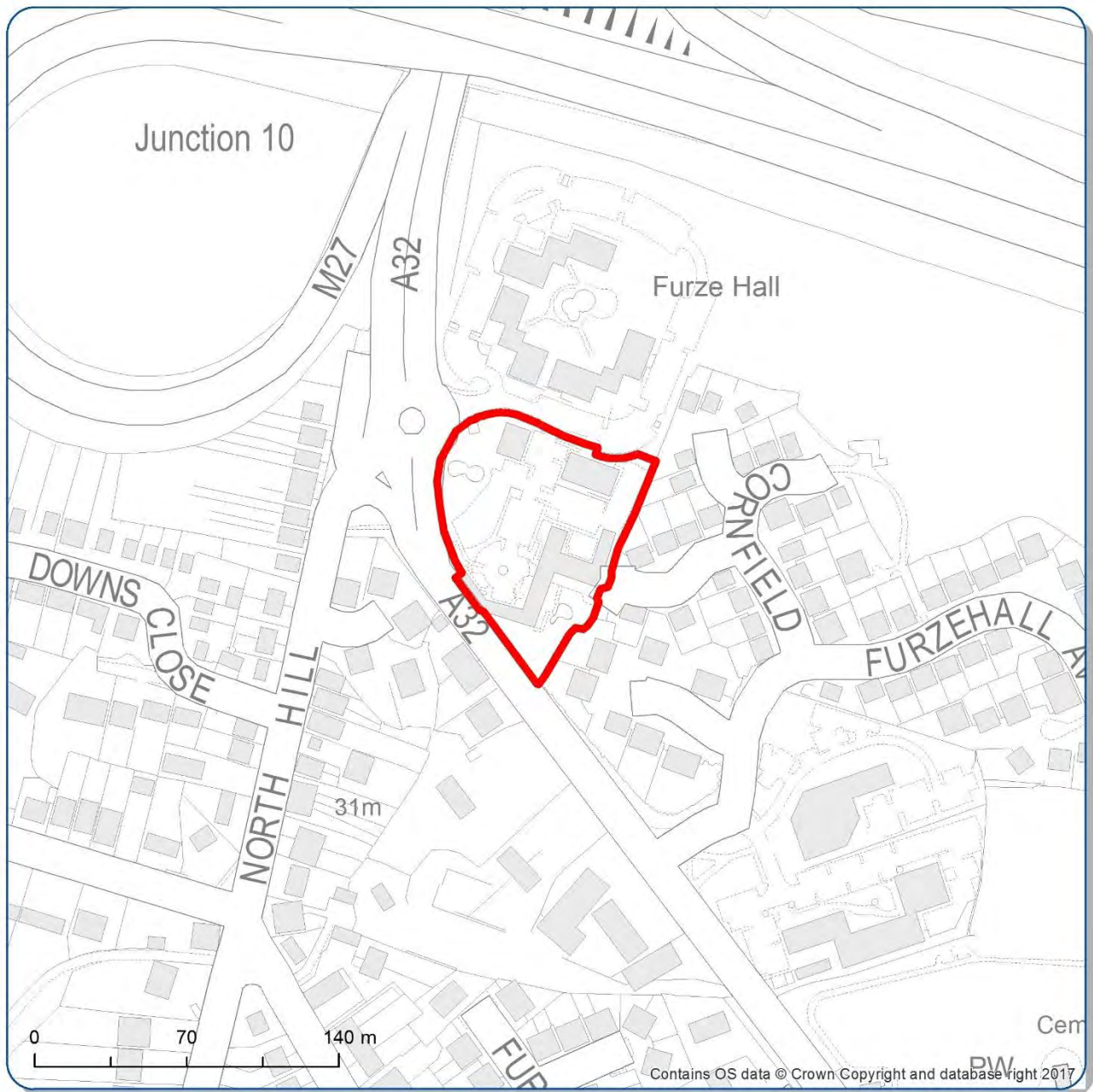
FAREHAM
BOROUGH COUNCIL

SITE ID 128

**FURZEHALL FARM, WICKHAM
ROAD, FAREHAM**



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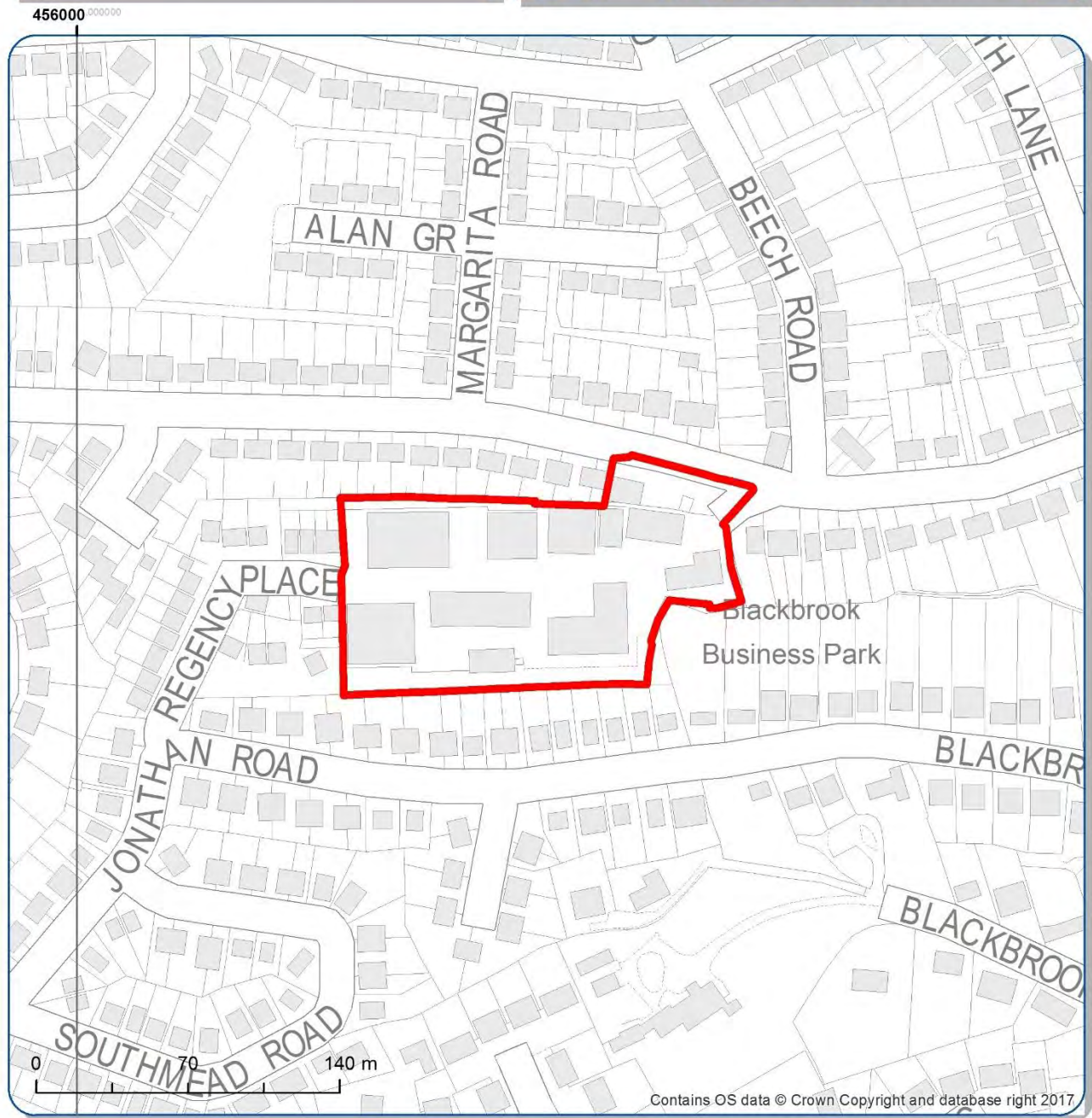
FAREHAM
BOROUGH COUNCIL

SITE ID 138

**BLACKBROOK ROAD
INDUSTRIAL ESTATE**



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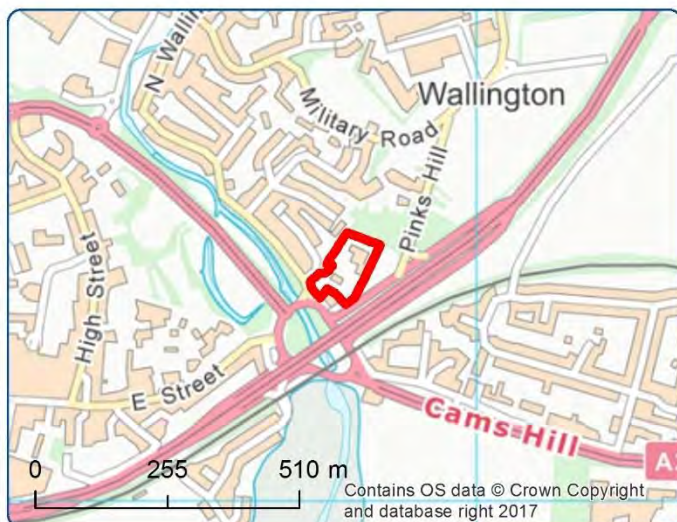
FAREHAM
BOROUGH COUNCIL

SITE ID 139

WATERSIDE HOUSE



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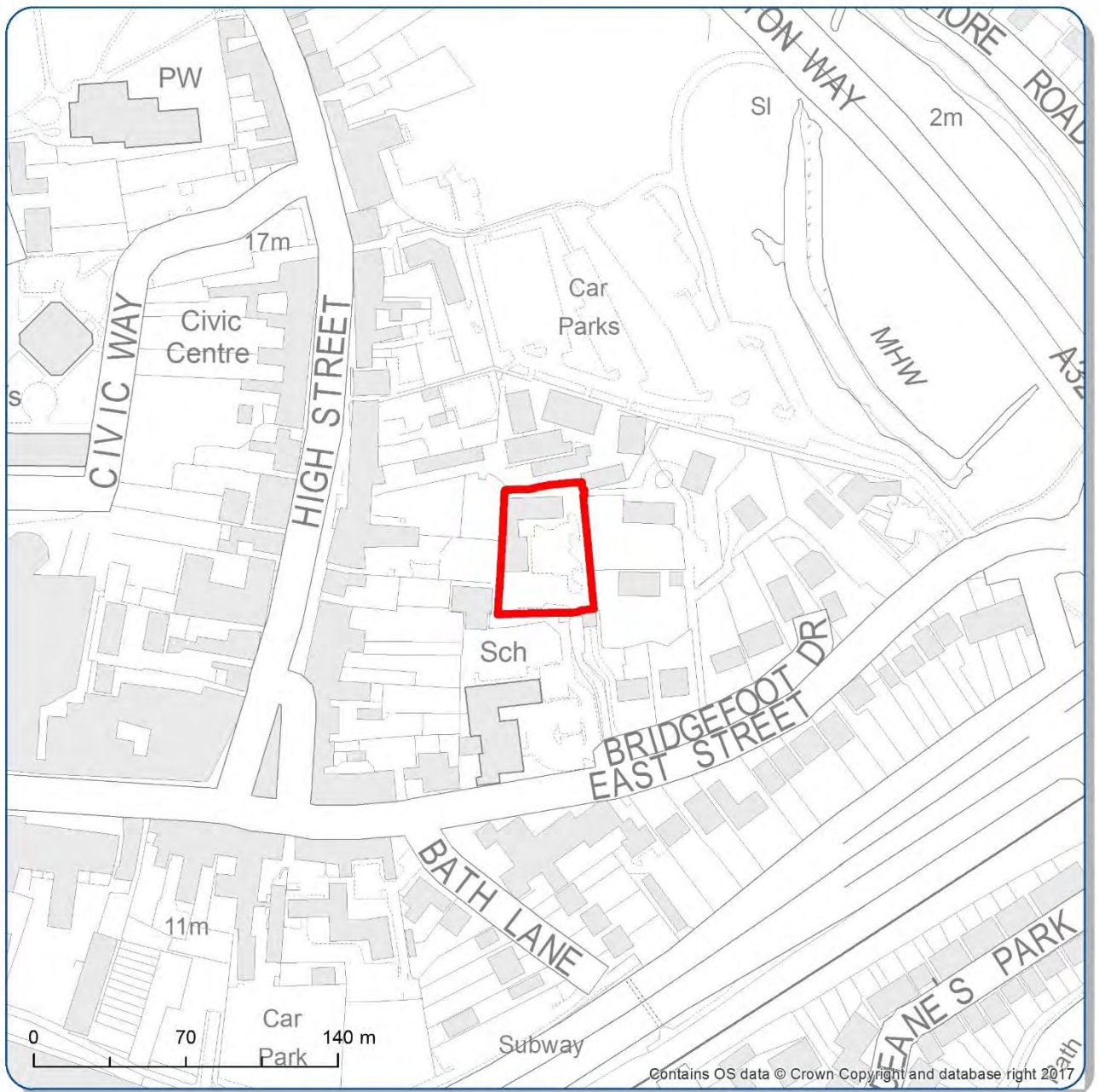
FAREHAM
BOROUGH COUNCIL

SITE ID 161

HIGH WALLS, FAREHAM



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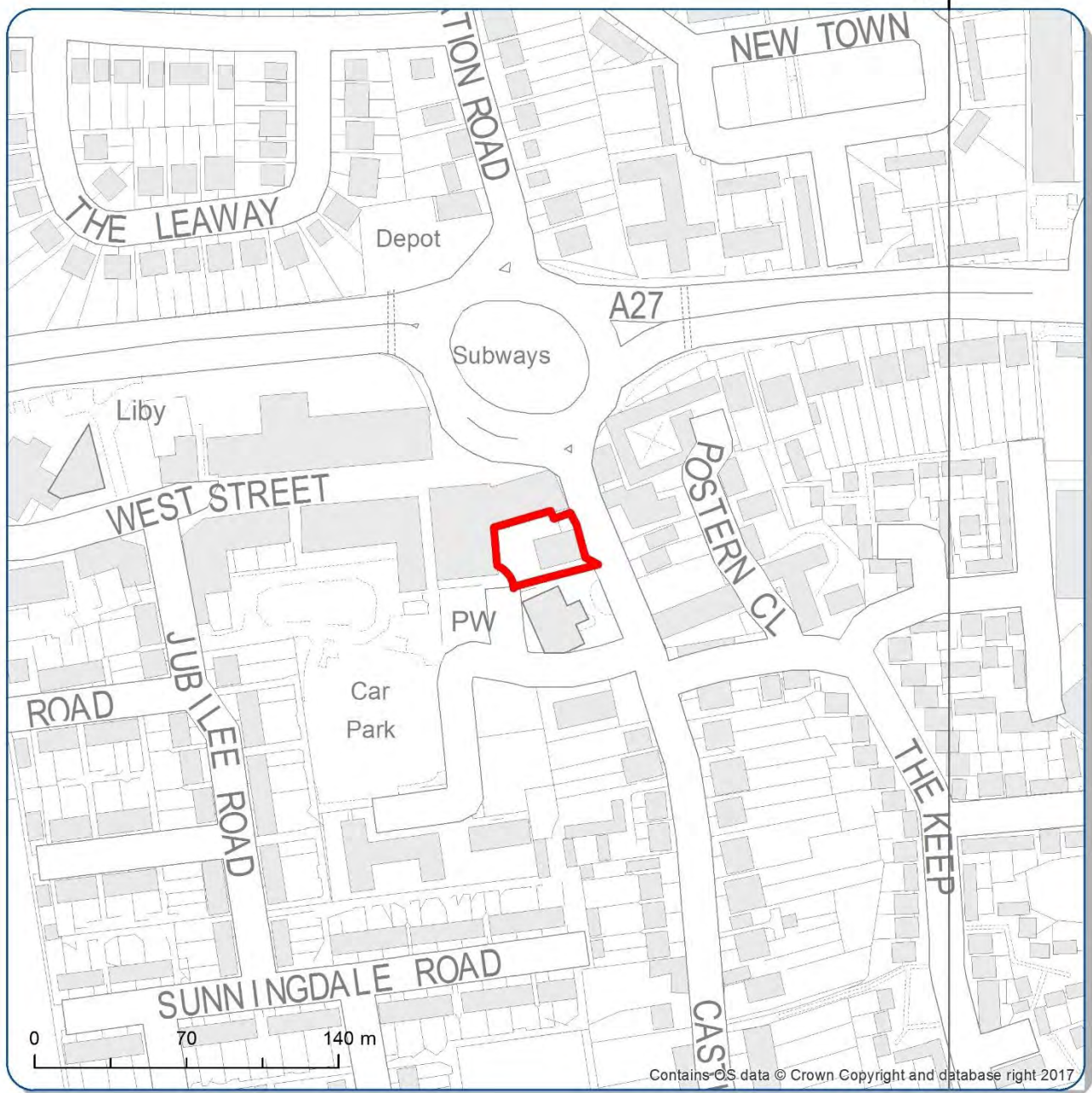
CASTLE COURT



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FAREHAM
BOROUGH COUNCIL

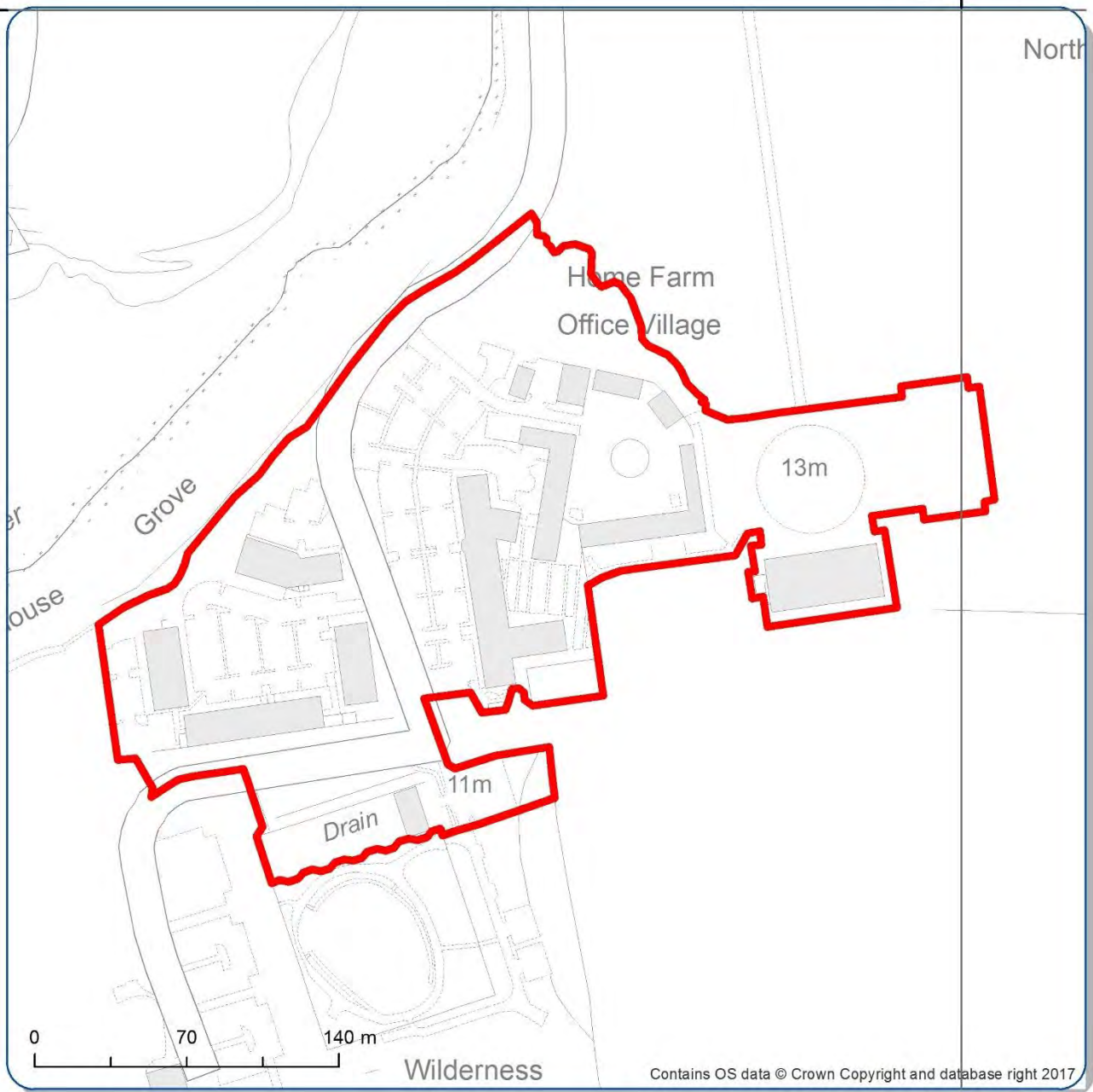
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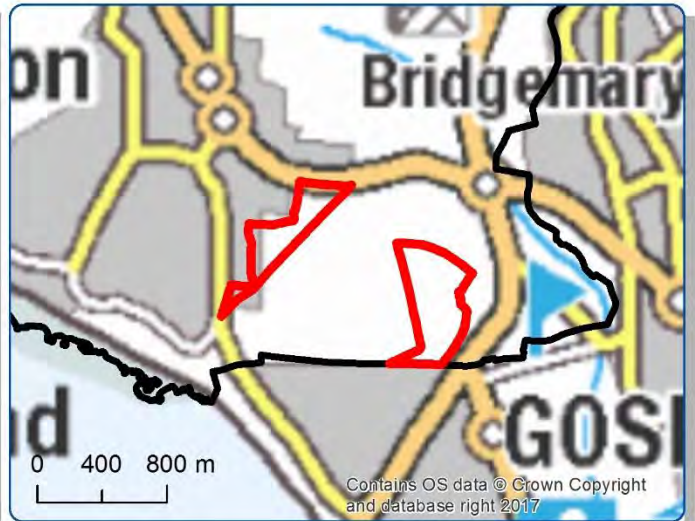
FAREHAM
BOROUGH COUNCIL

SITE ID 172

**DAEDALUS AIRFIELD,
STUBBINGTON**



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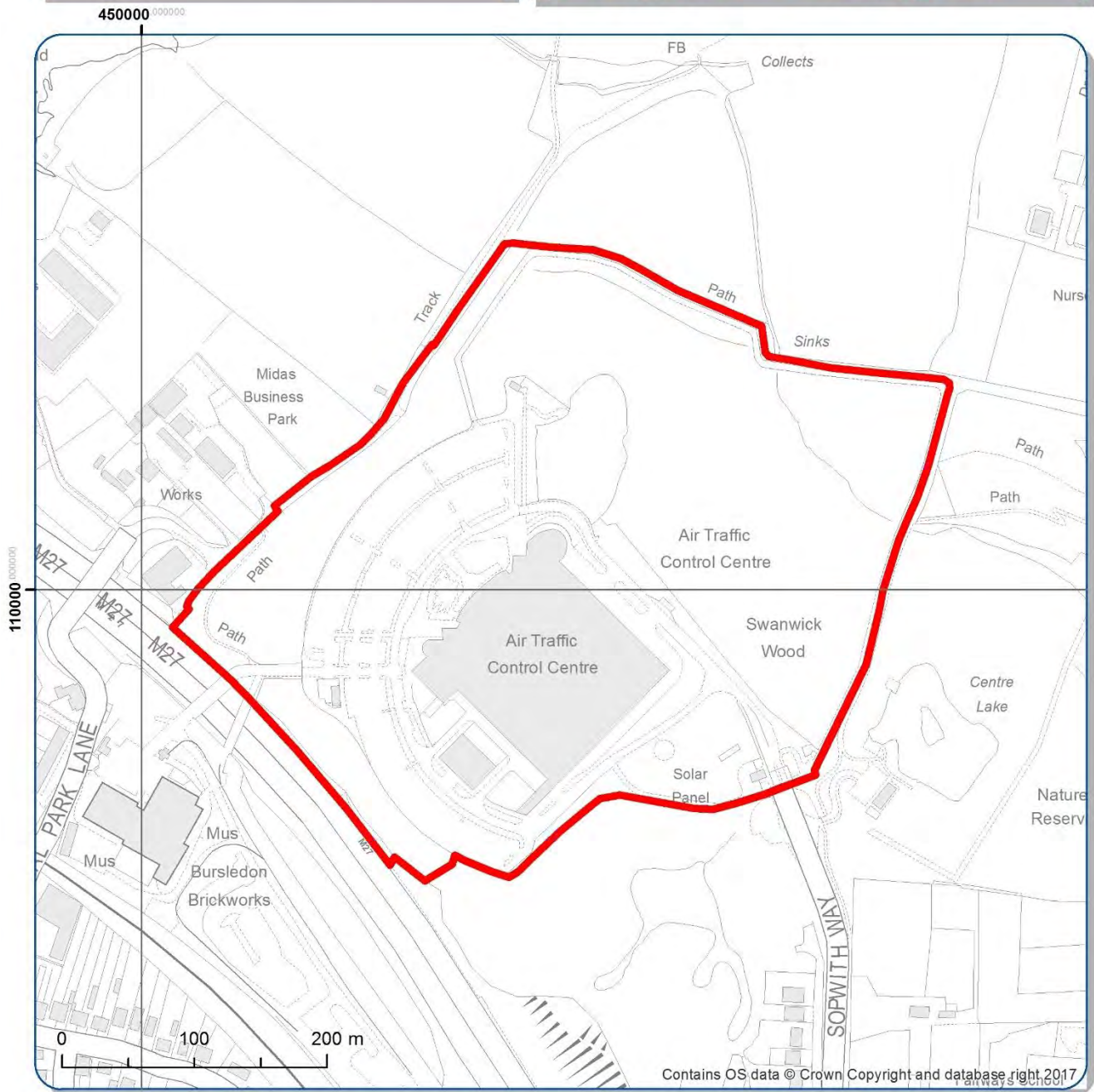
FAREHAM
BOROUGH COUNCIL

SITE ID 173

**NATIONAL AIR TRAFFIC
SERVICES (NATS)**



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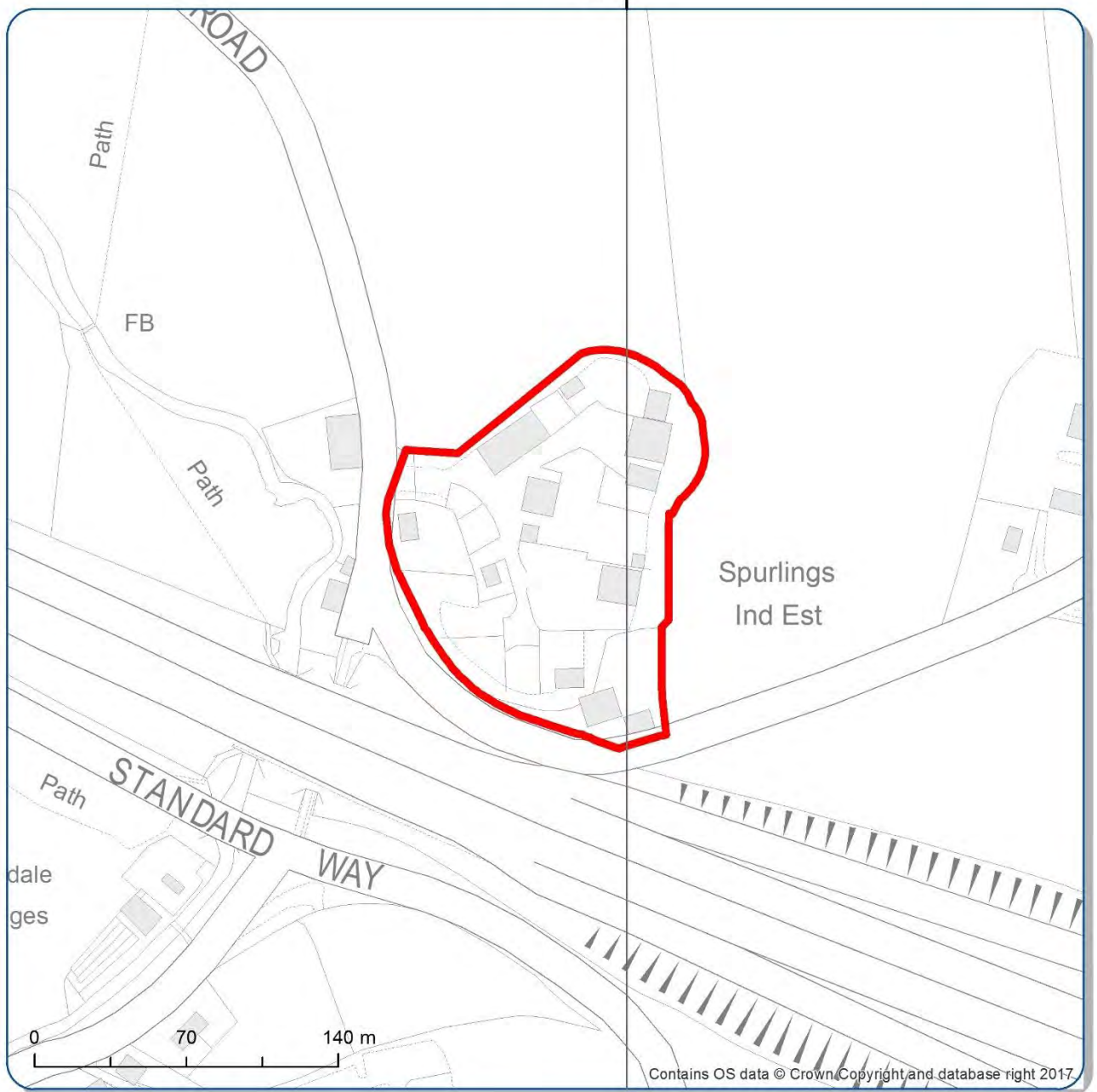
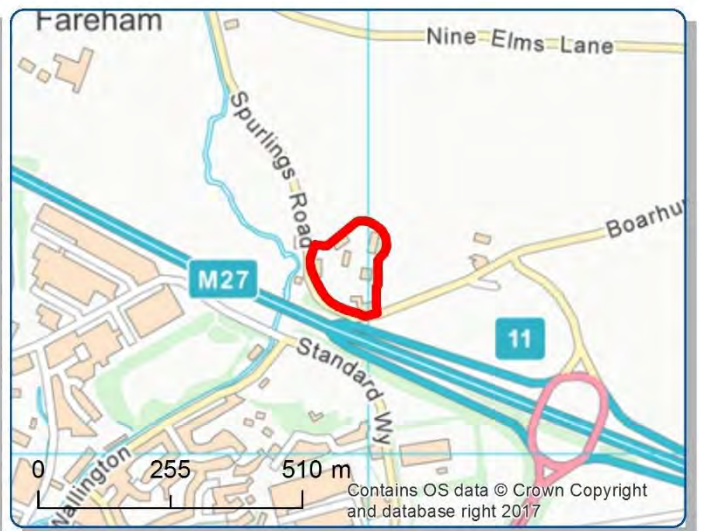
FAREHAM
BOROUGH COUNCIL

SITE ID 179

SPURLINGS INDUSTRIAL ESTATE



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BOROUGH COUNCIL

SITE ID 1628

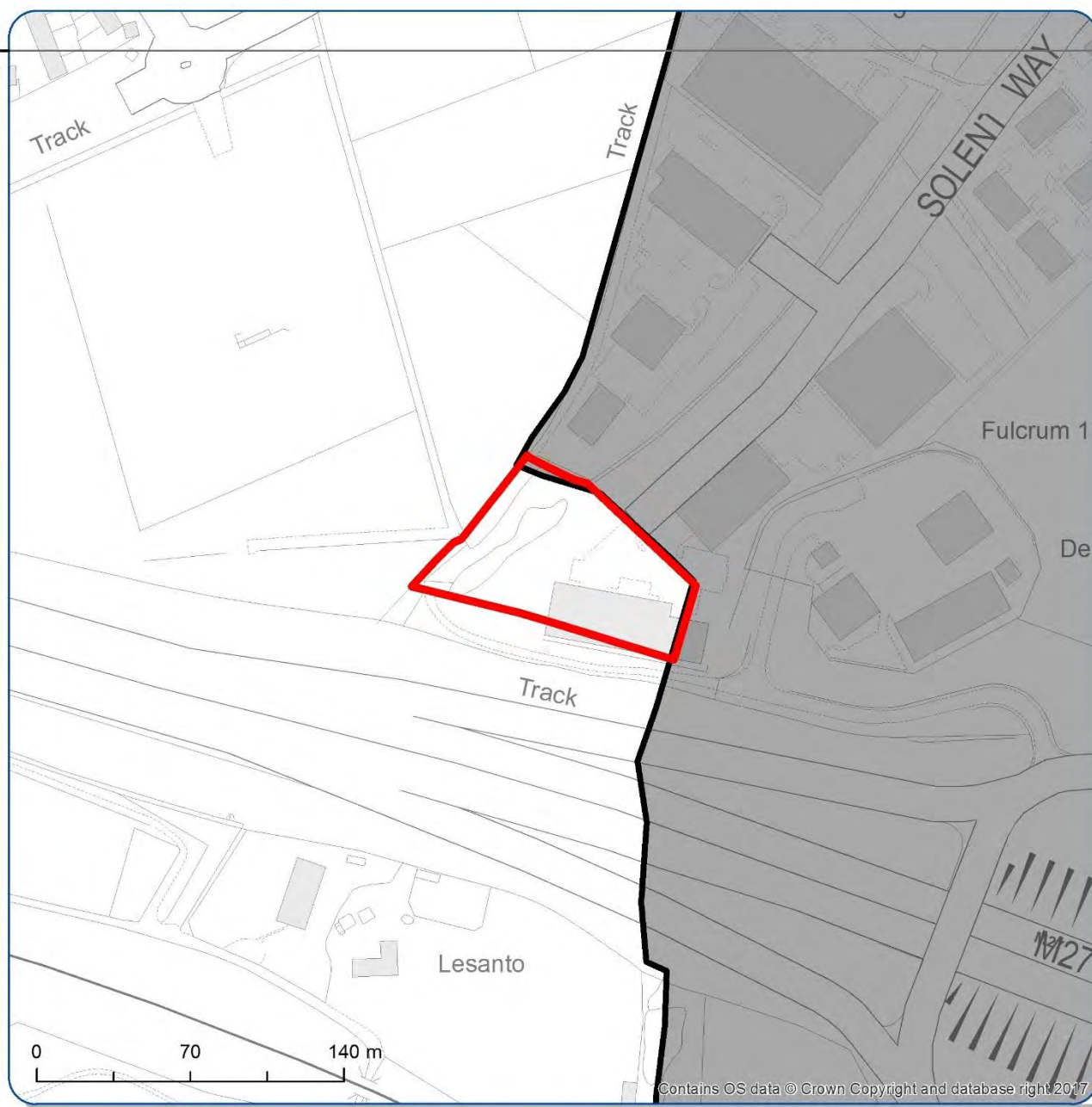
**SOUTH OF SOLENT WAY,
WHITELEY**



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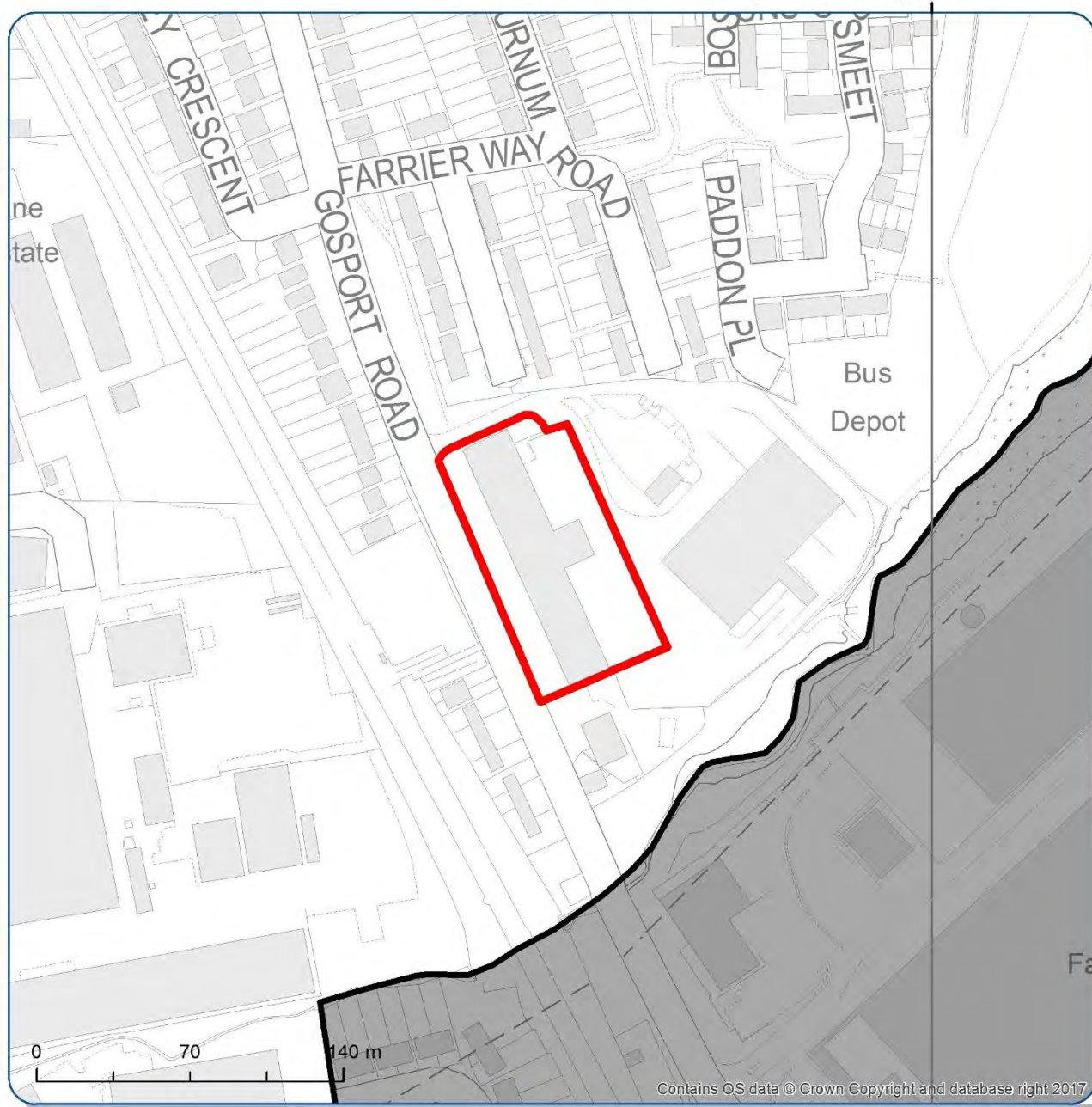
FAREHAM
BOROUGH COUNCIL

SITE ID 1700

242-248 GOSPORT ROAD



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SITES NOT RECOMMENDED FOR PROTECTION	
ID	Site Name
36	Charity Farm
37	Pinks Timber Yard
40	Gosport Road Bus Depot
83	Windmill Grove
85	Lysses Court
86	1&2 The Avenue
88	West End (West), South of Station roundabout
91	Lower Quay & Quayside
93	Hammonds
94	Corner of Stow Estate and Highlands Road
97	R.O. Bridge Road Parade
101	Coal Park Lane
133	Barnbrook Systems
137	Swanwick Shore Road
186	Albany Business Centre
187	310A-312 & 316 Botley Road
1232	8-10 Southampton Hill
1261	Cranleigh Road
1267	Brook Lane
1272	Dean Farm Estate
1274	Carron Row Farm
1275	St Margarets Lane
1276	North Coal Park Lane
1280	Great Brook
1281	Fontley Farm House
2960	Part of Fareham Point, Wickham Road & North End of High Street
2963	Part of Furze Court, Wickham Road
3141	Riverside Yard

FAREHAM
BOROUGH COUNCIL

SITE ID 36

CHARITY FARM

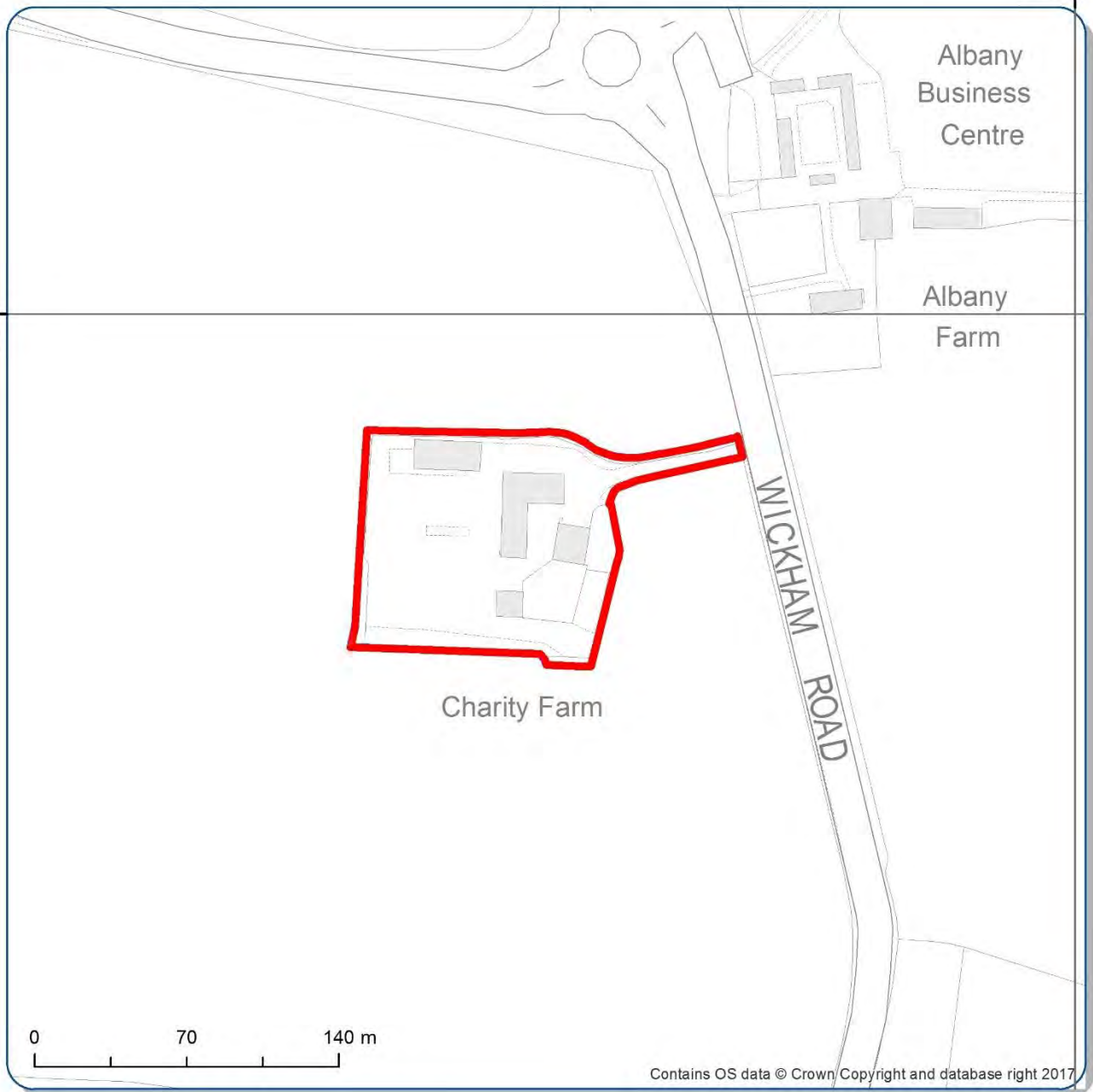


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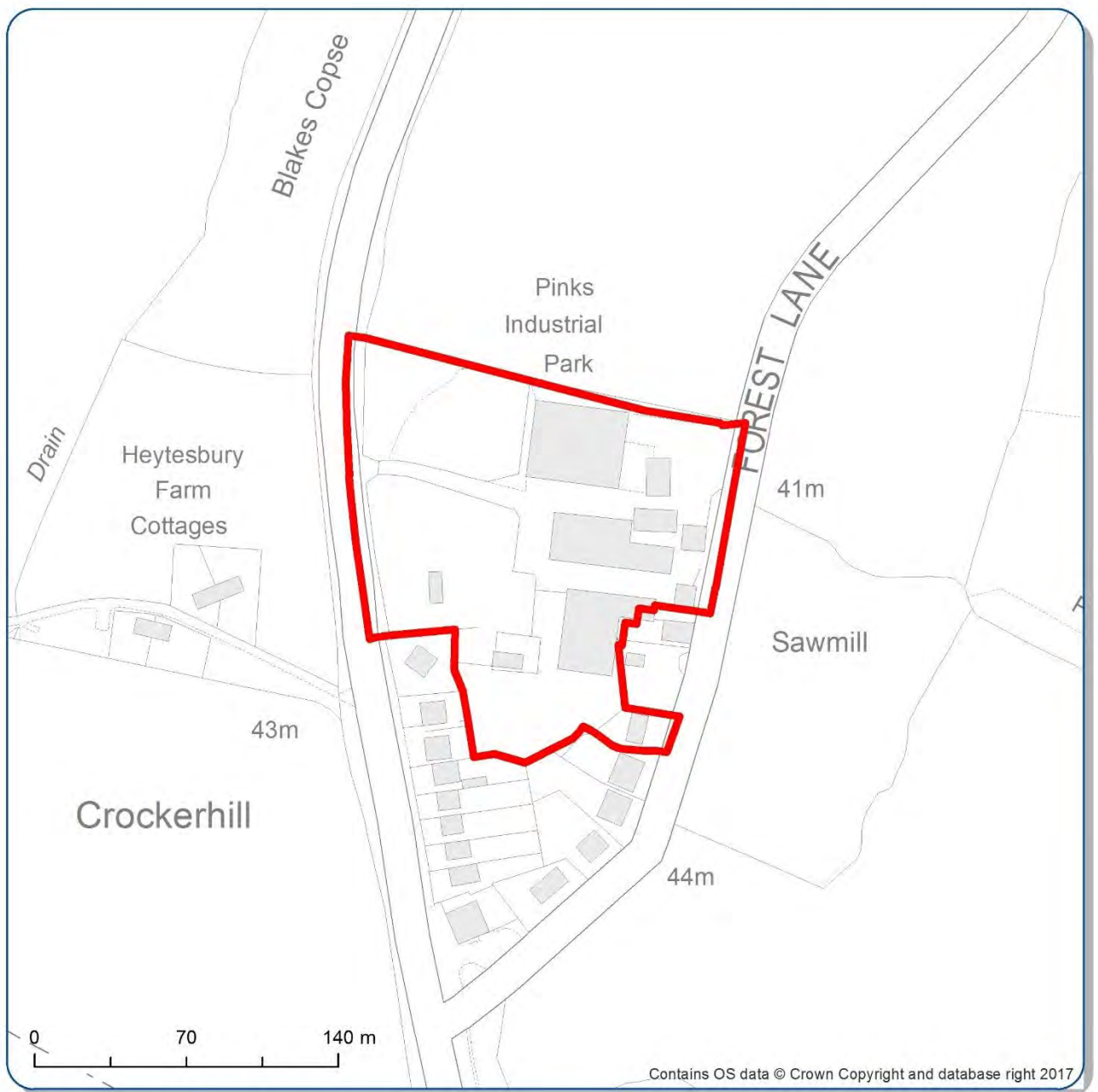
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BOROUGH COUNCIL

SITE ID 37

PINKS TIMBER YARD



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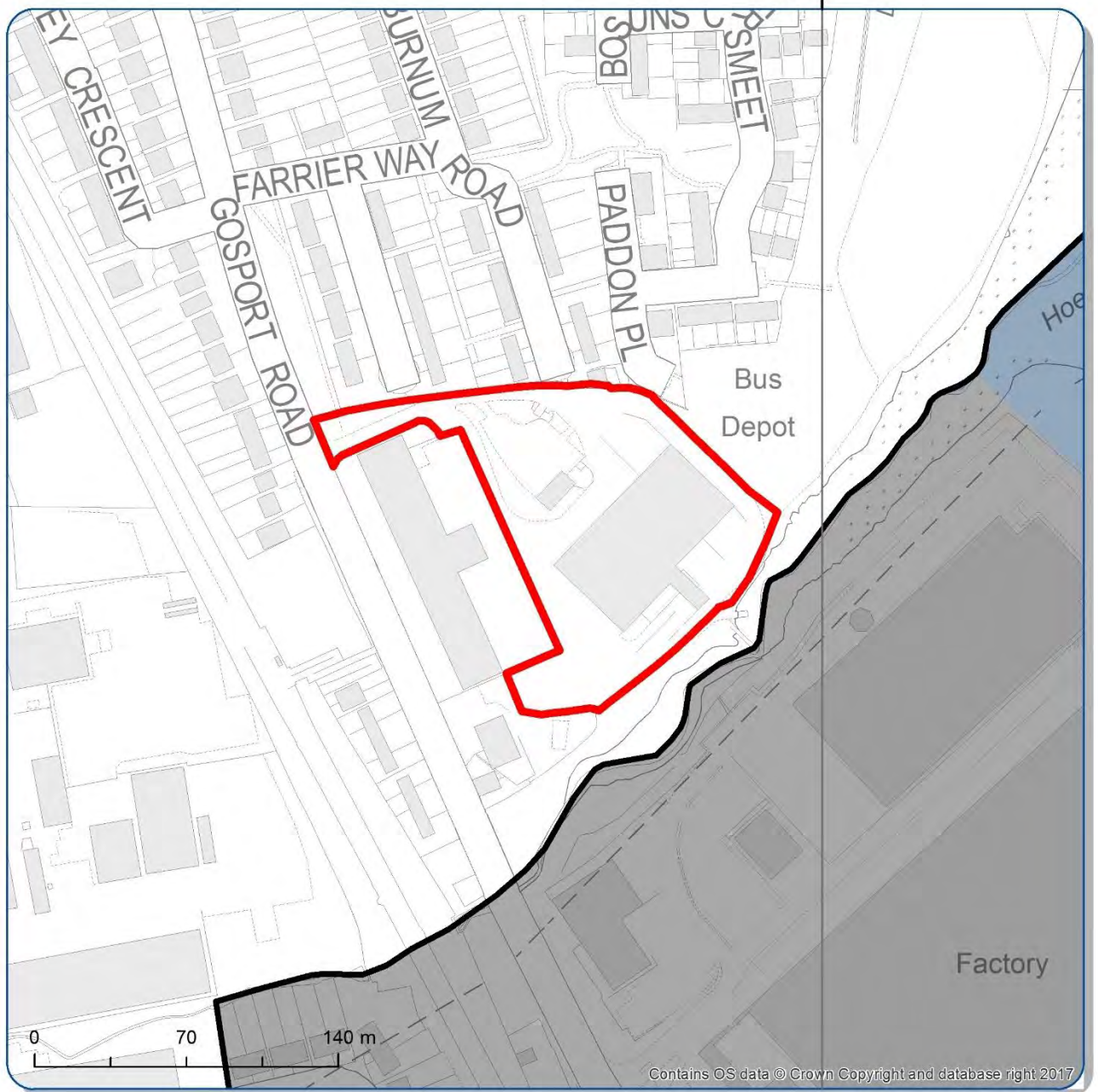
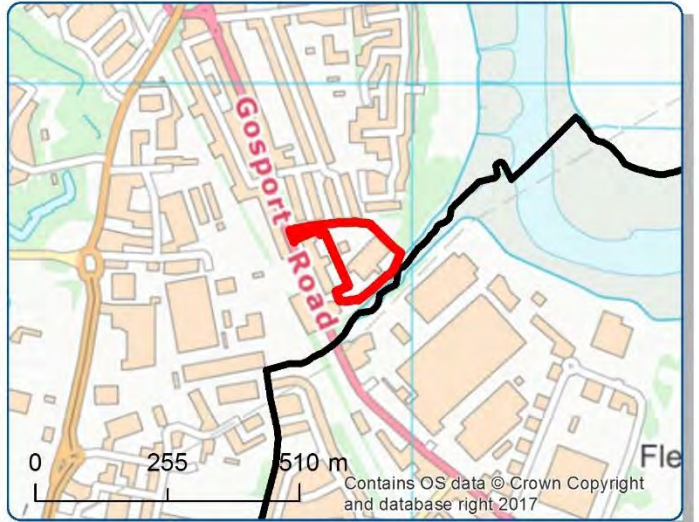
FAREHAM
BOROUGH COUNCIL

SITE ID 40

BUS DEPOT, FAREHAM



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FAREHAM
BOROUGH COUNCIL

SITE ID 83

**WINDMILL GROVE,
PORTCHESTER**



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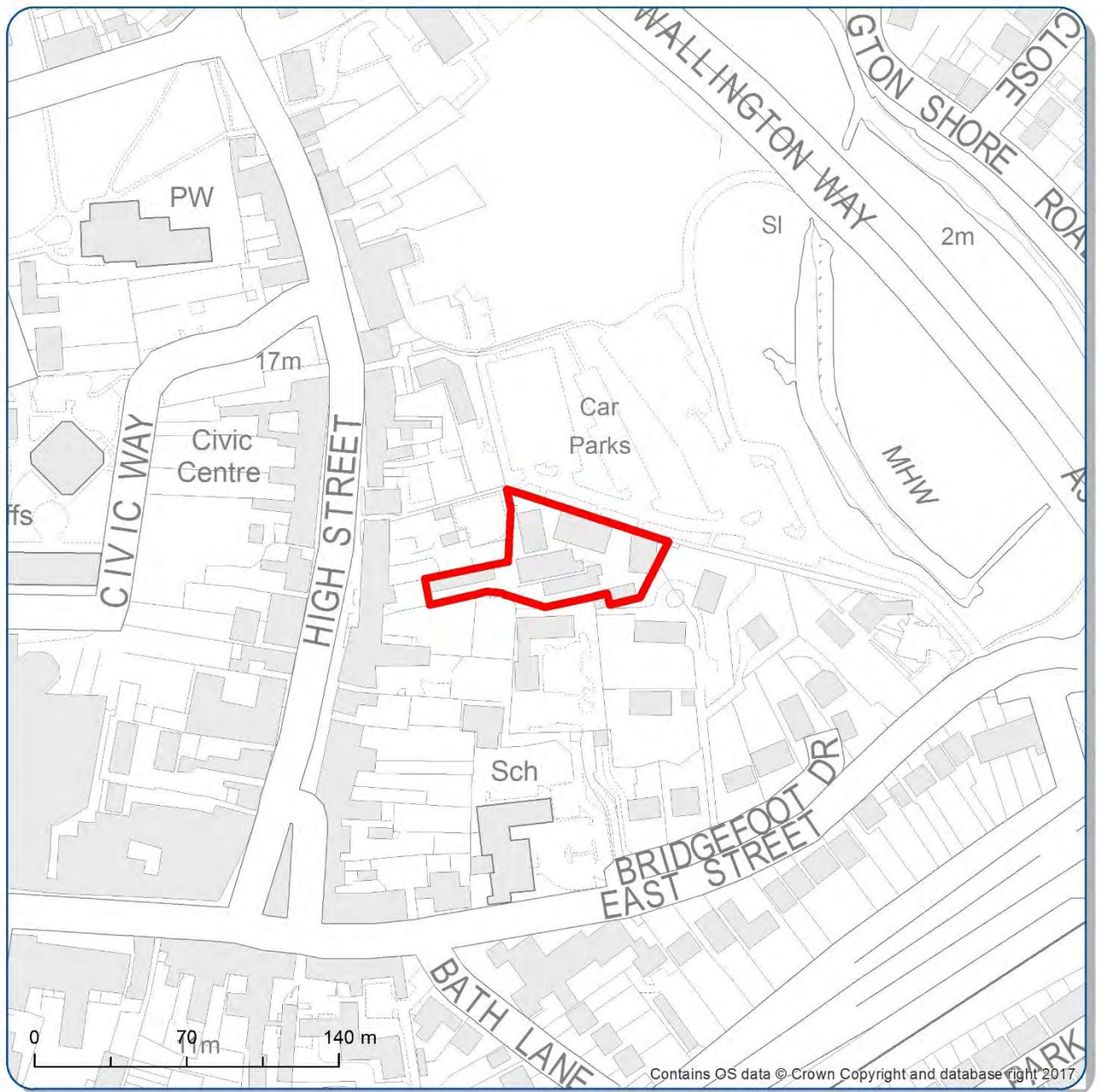
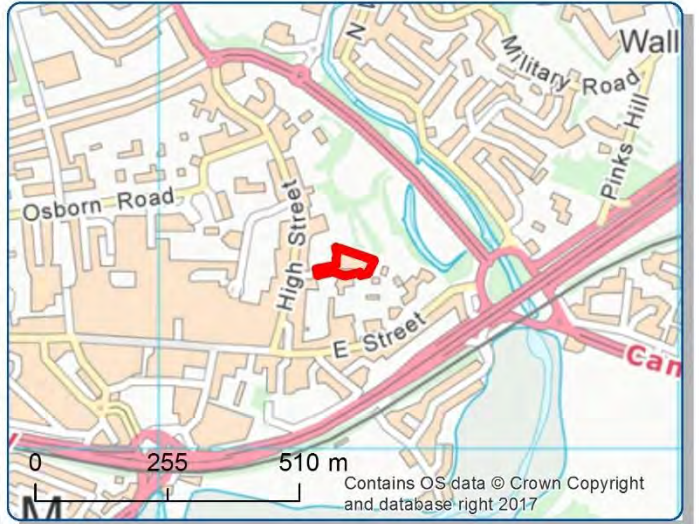
FAREHAM
BOROUGH COUNCIL

SITE ID 85

LYSSES COURT, FAREHAM



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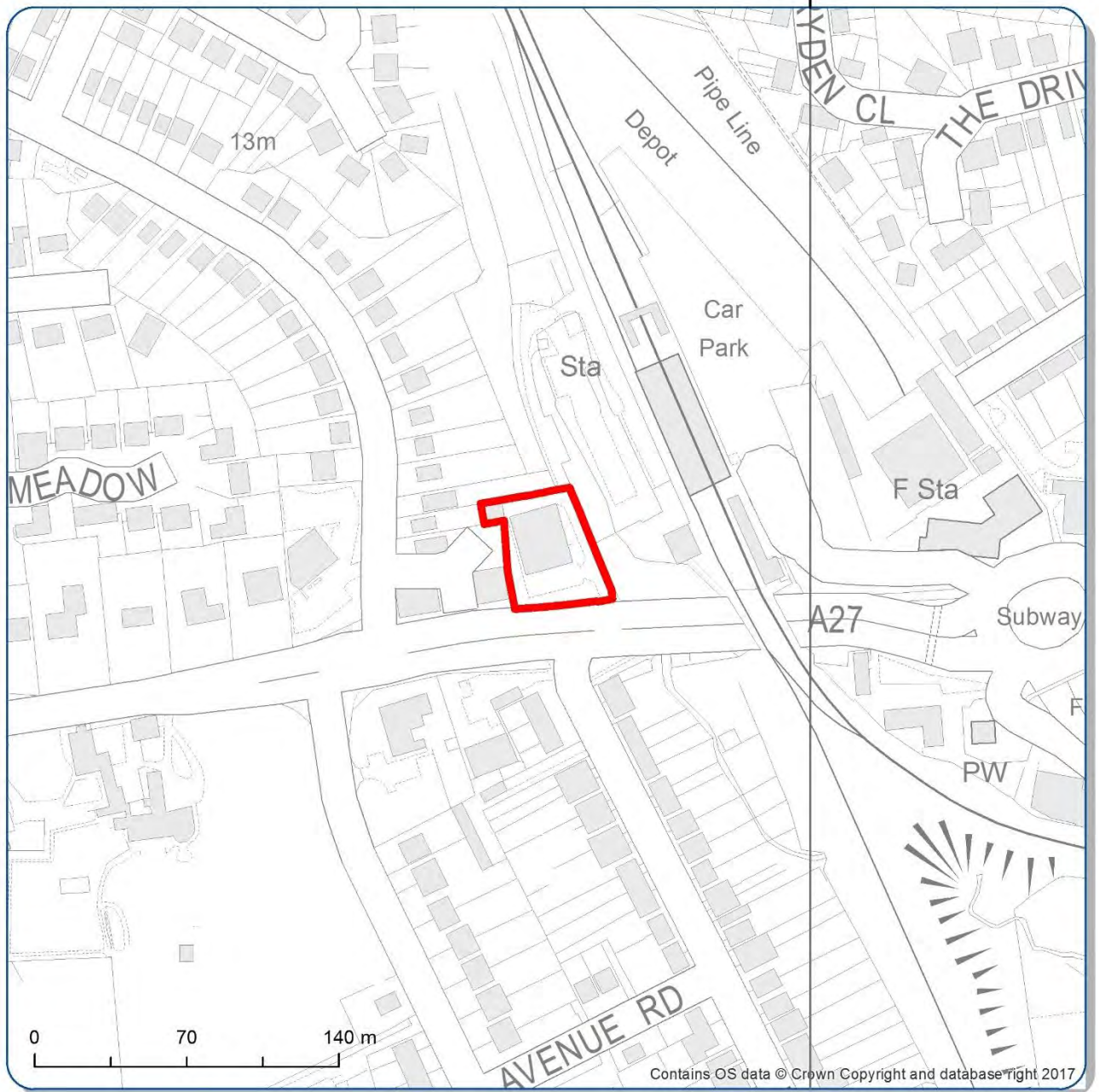
BOROUGH COUNCIL

SITE ID 86

1-2 THE AVENUE, FAREHAM



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FAREHAM
BOROUGH COUNCIL

SITE ID 88

**WEST END (WEST), SOUTH OF
STATION ROUNDABOUT**



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FAREHAM
BOROUGH COUNCIL

SITE ID 91

LOWER QUAY & QUAYSIDE



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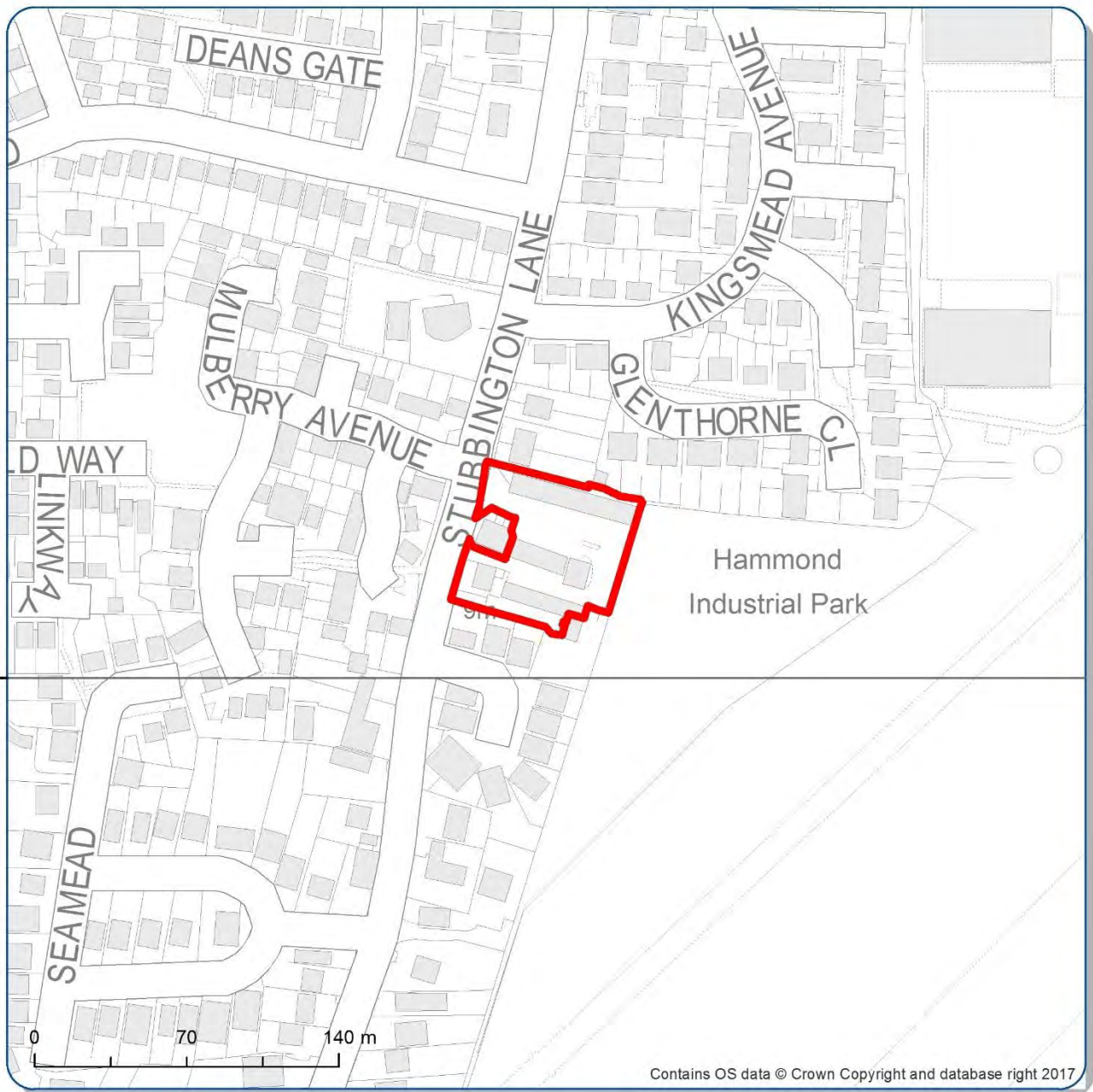
FAREHAM
BOROUGH COUNCIL

SITE ID 93

**HAMMOND INDUSTRIAL PARK,
STURBINGTON LANE**



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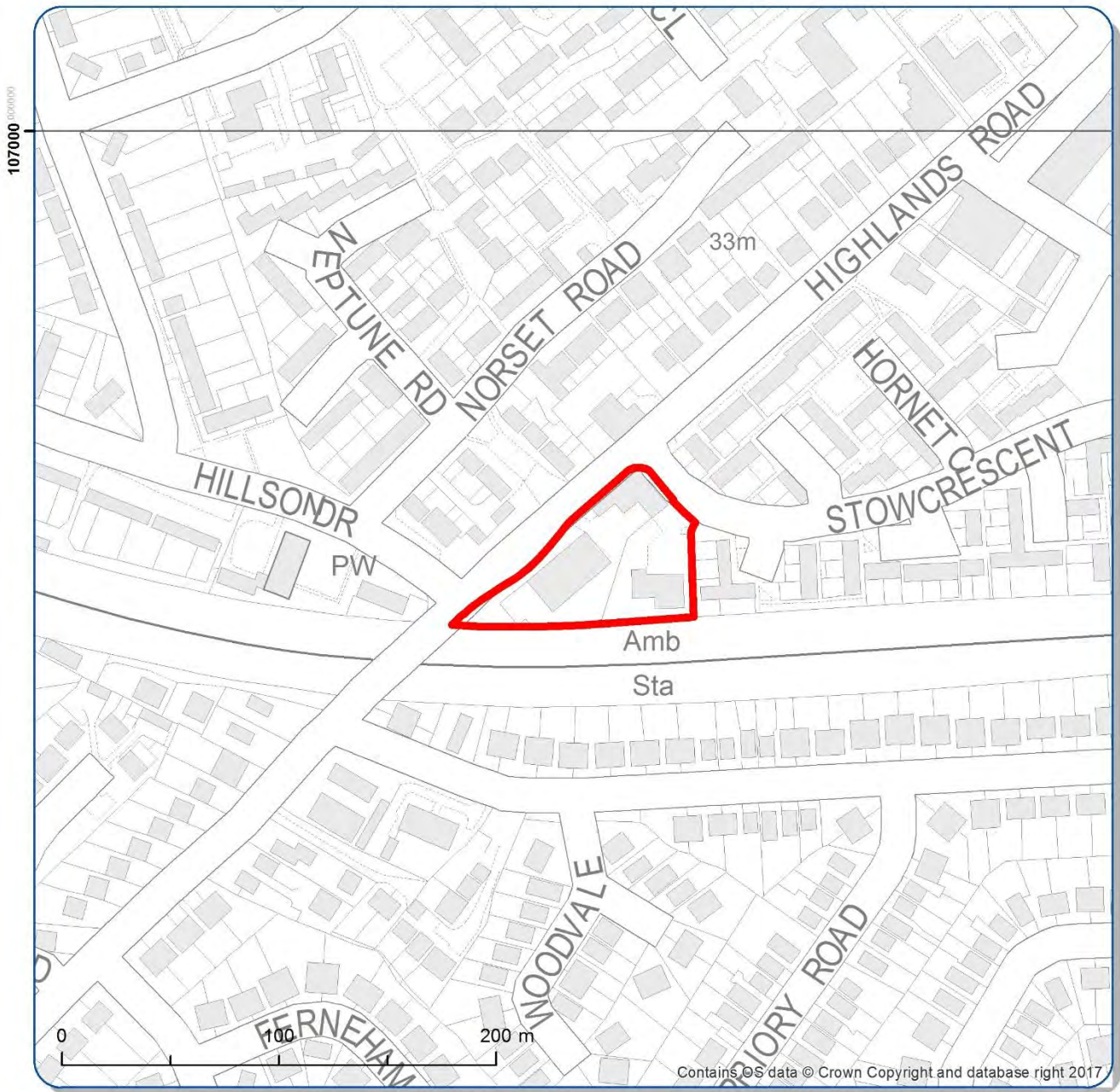
FAREHAM
BOROUGH COUNCIL

SITE ID 94

**CORNER OF STOW ESTATE AND
HIGHLANDS ROAD**



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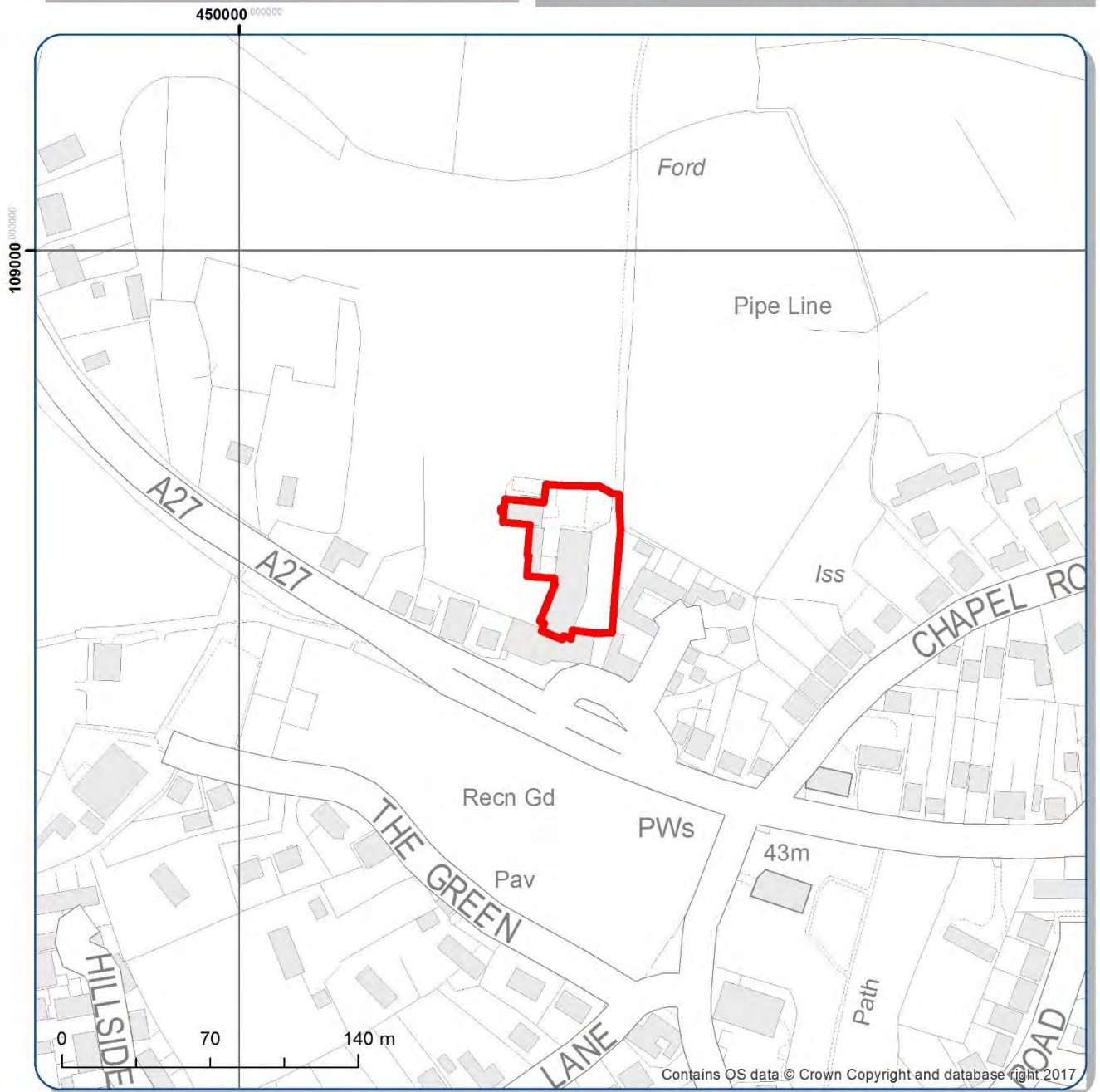
FAREHAM
BOROUGH COUNCIL

SITE ID 97

R.O. BRIDGE RD PARADE



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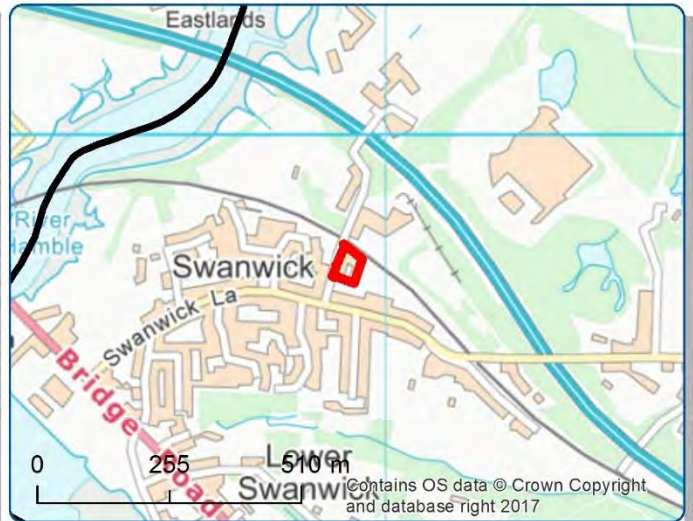


FAREHAM
BOROUGH COUNCIL

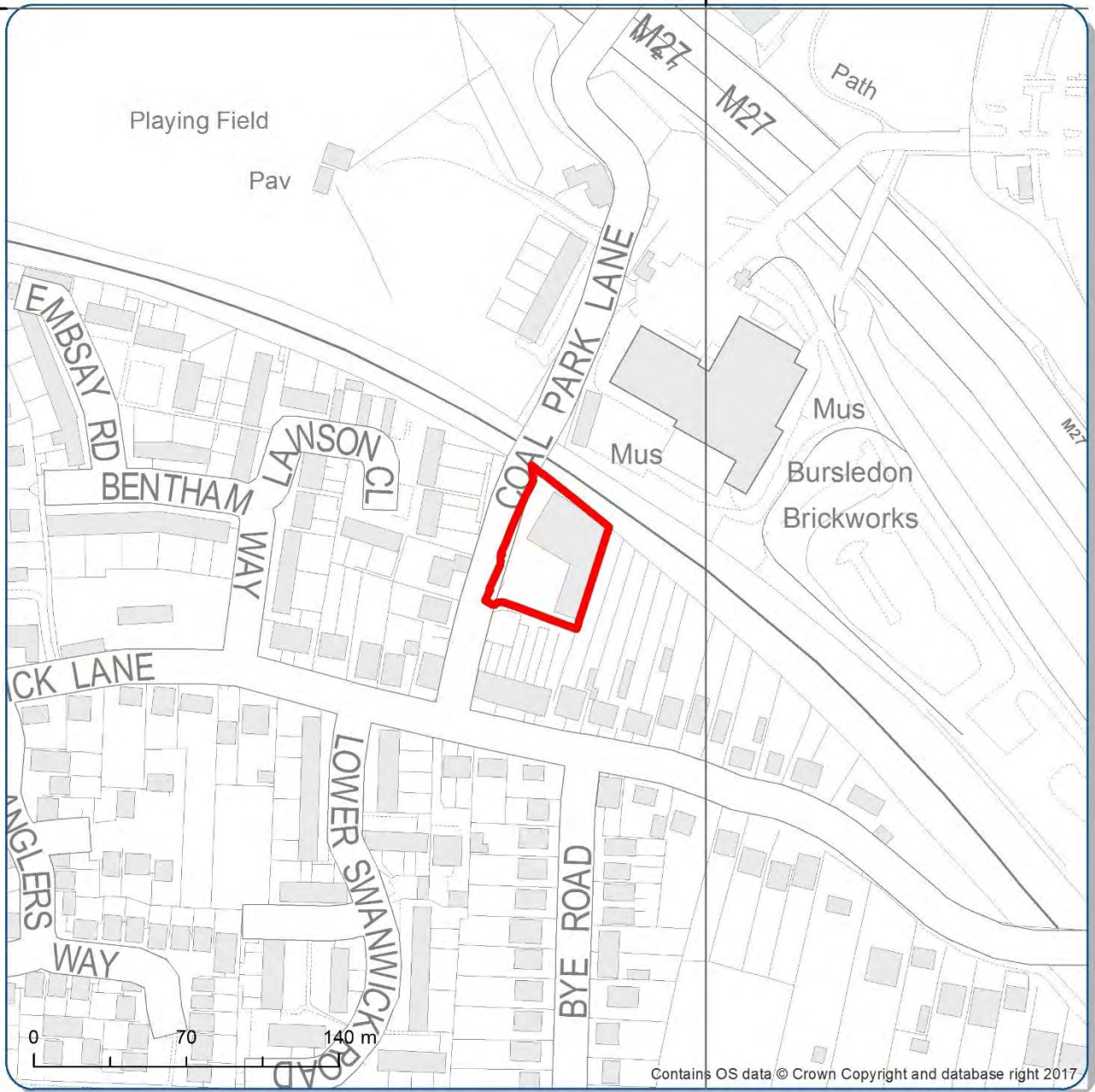
SITE ID 101
COAL PARK LANE



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110000 000000



FAREHAM
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SITE ID 133

BARNBROOK SYSTEMS



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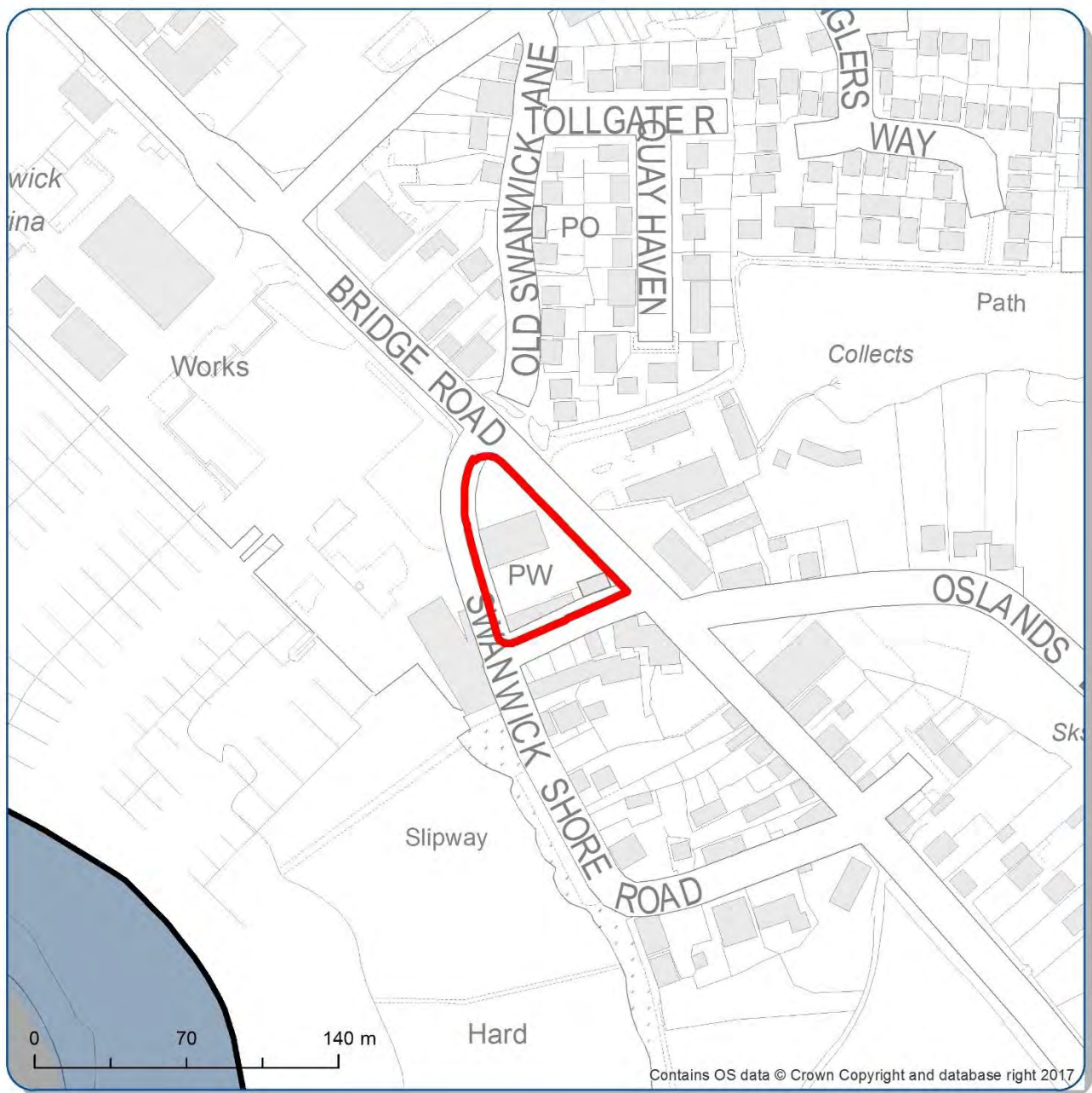
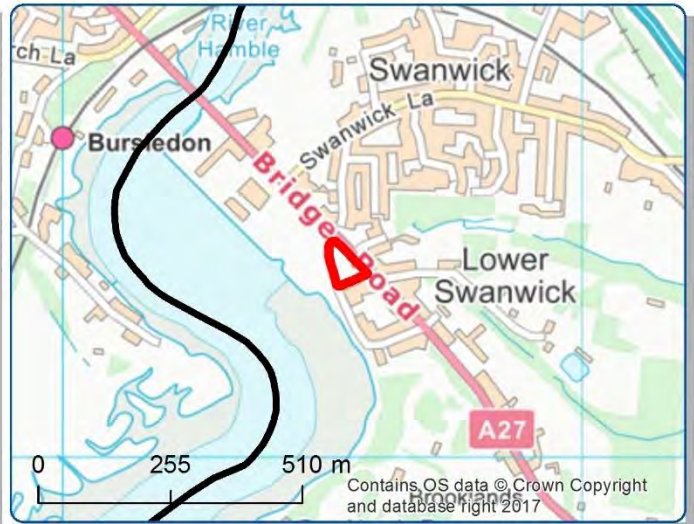
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BOROUGH COUNCIL

SITE ID 137

SWANWICK SHORE ROAD



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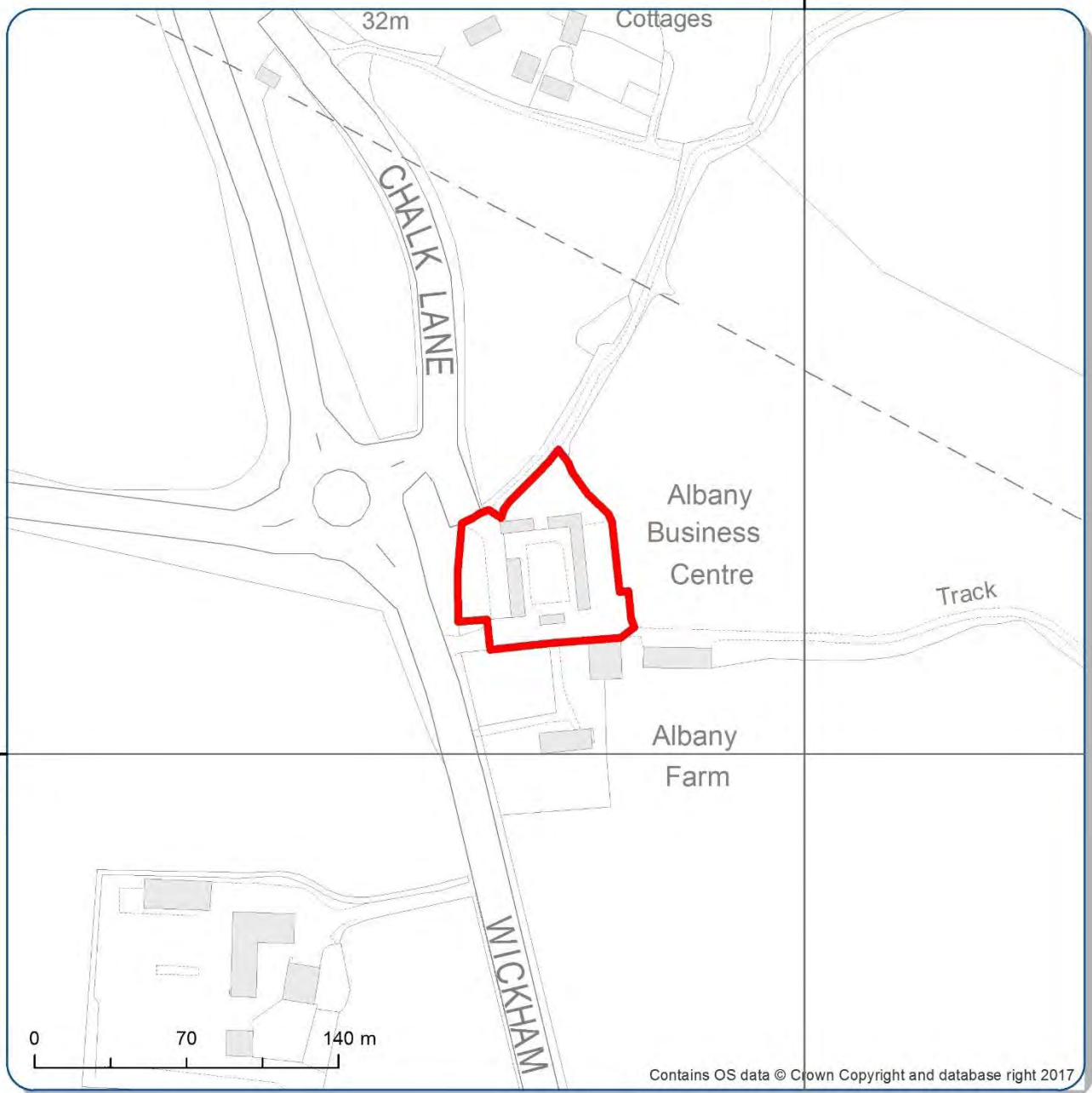
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BOROUGH COUNCIL

SITE ID 186

ALBANY BUSINESS CENTRE



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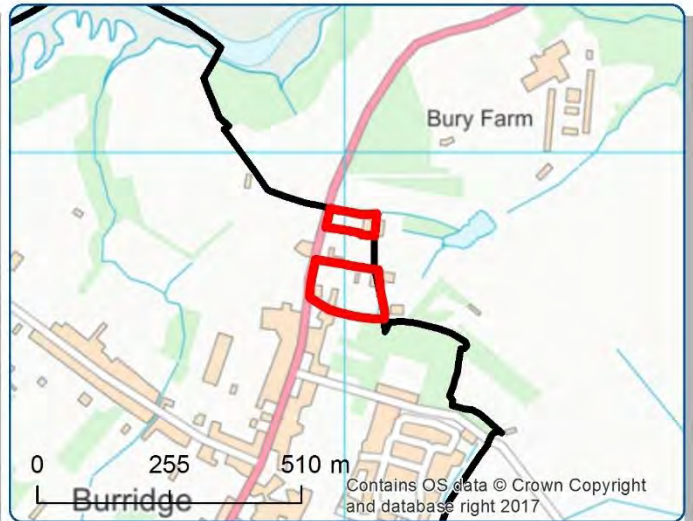
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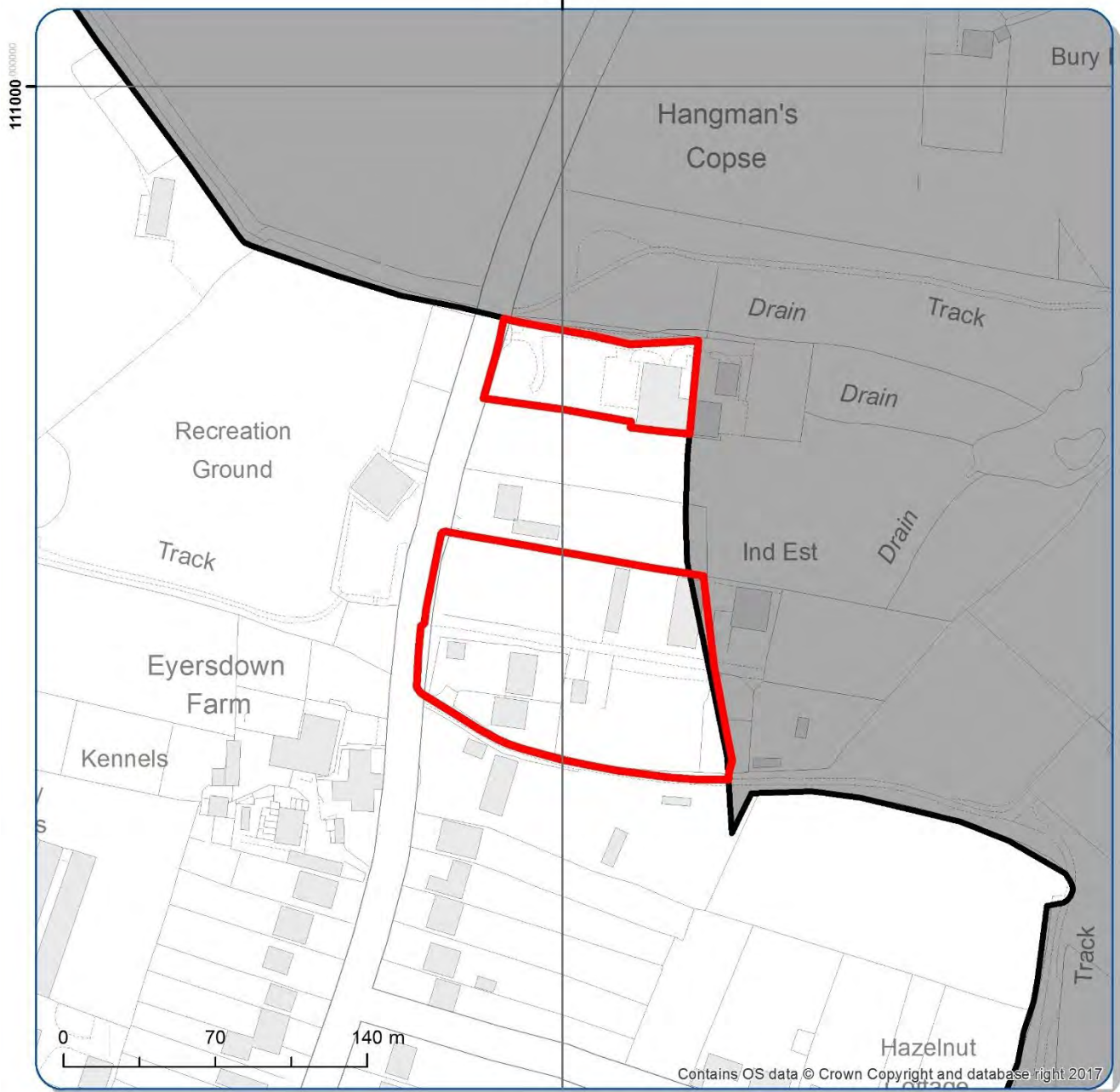
310A-312 & 316 BOTLEY ROAD



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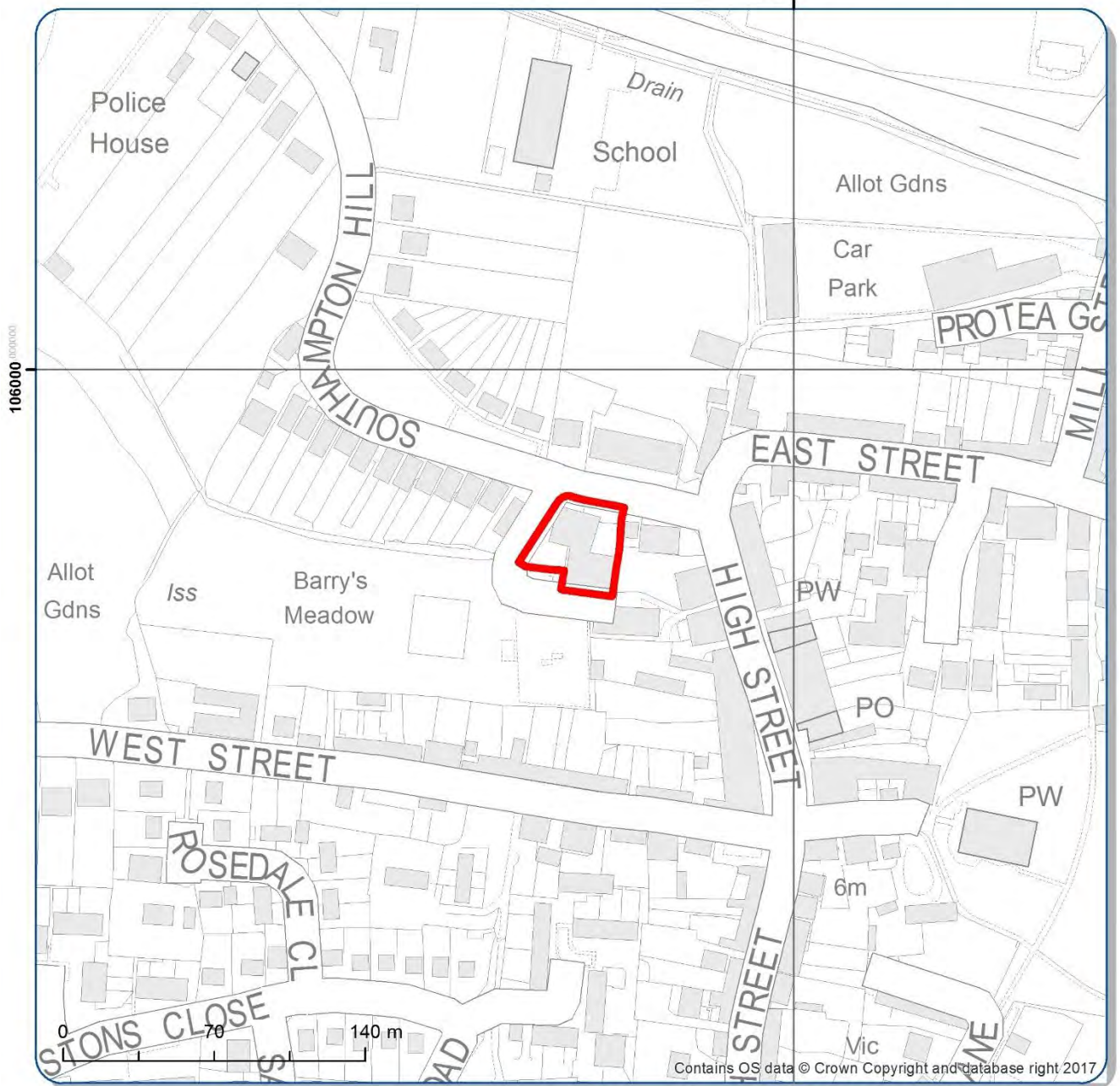
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SITE ID 1232

**POLYGRAPHIC HOUSE 8-10
SOUTHAMPTON HILL TITCHFIELD
HAMPSHIRE**



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FAREHAM
BOROUGH COUNCIL

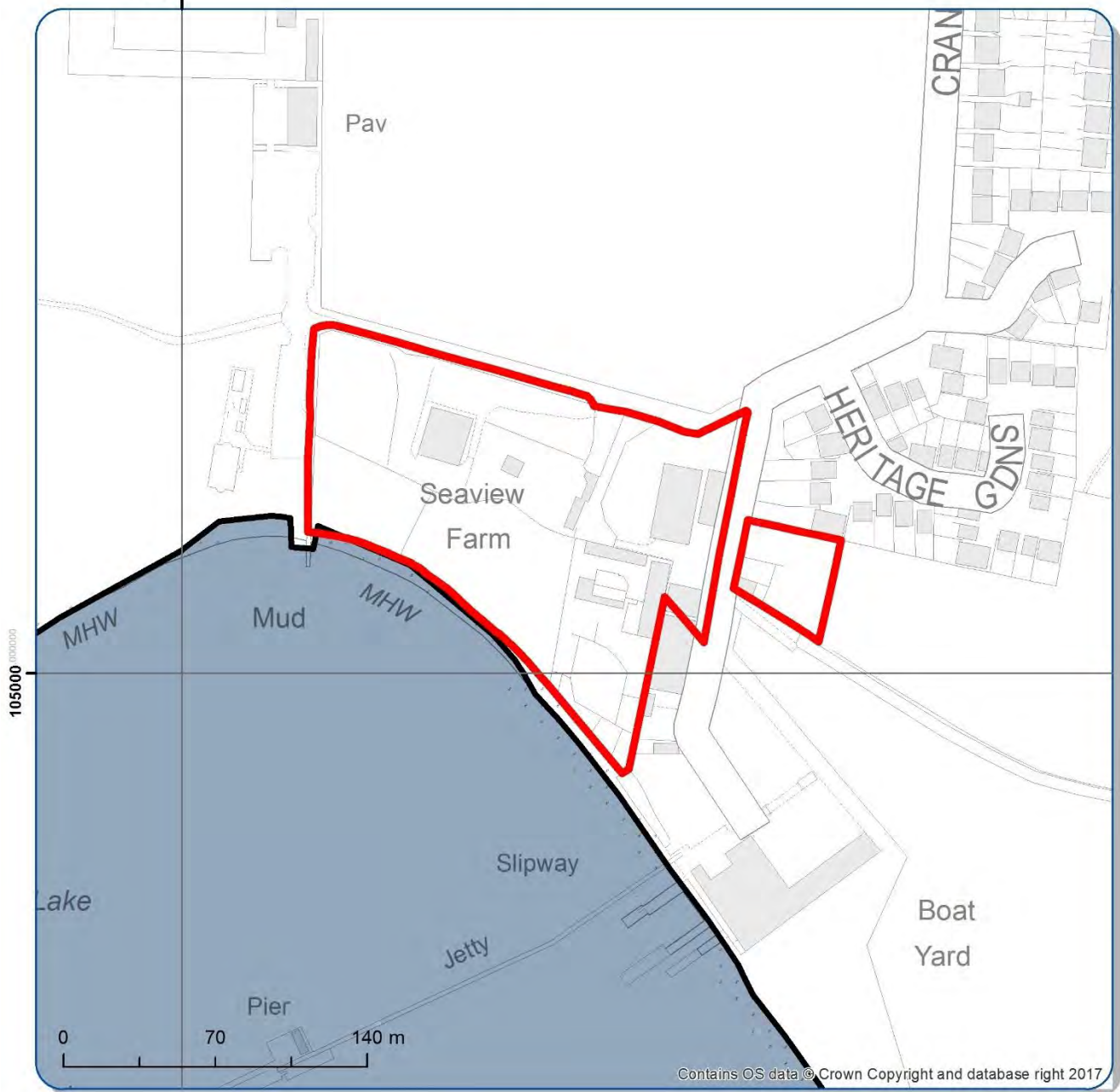
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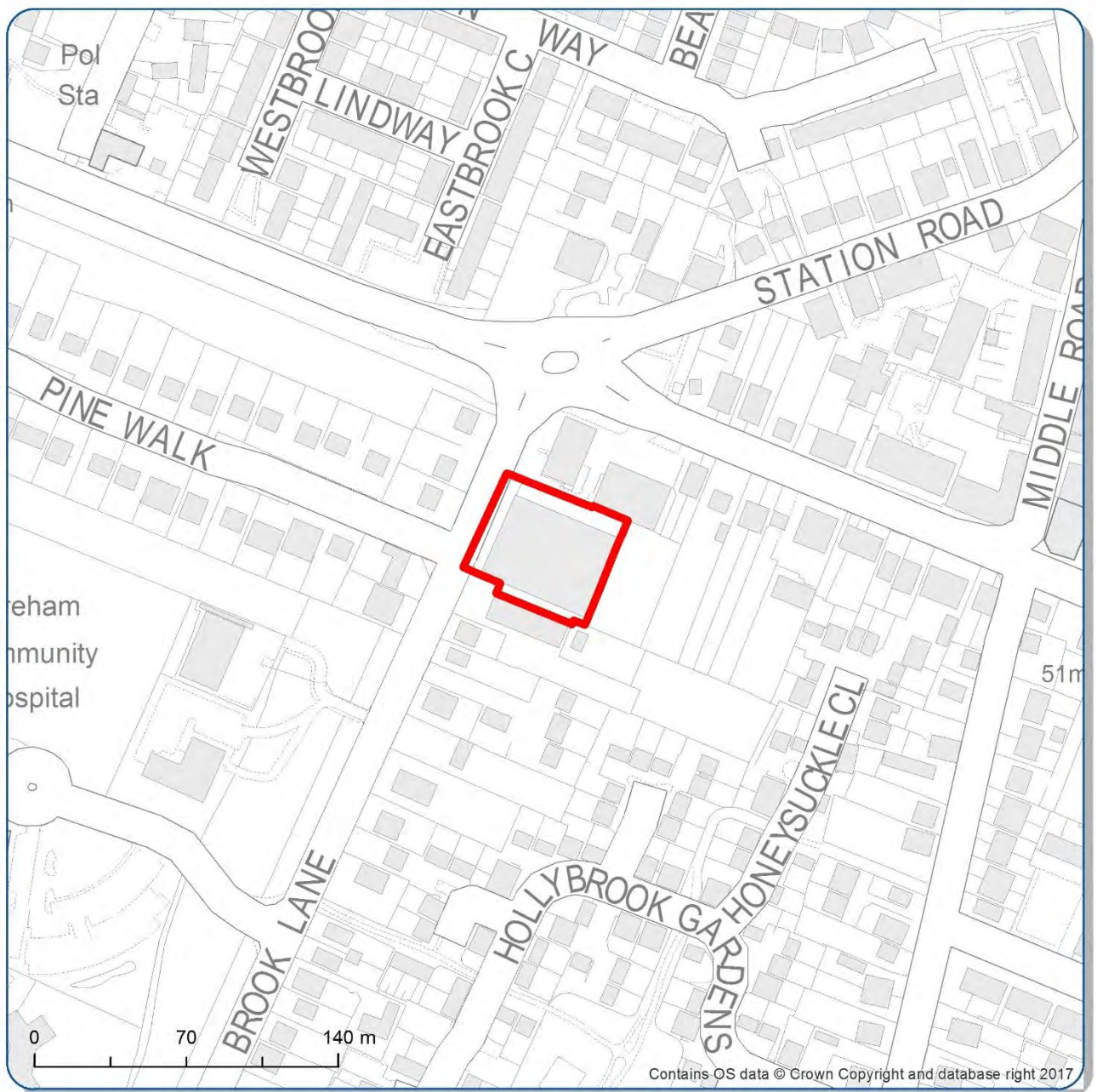
FAREHAM
BOROUGH COUNCIL

SITE ID 1267

BROOK LANE



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FAREHAM
BOROUGH COUNCIL

SITE ID 1272

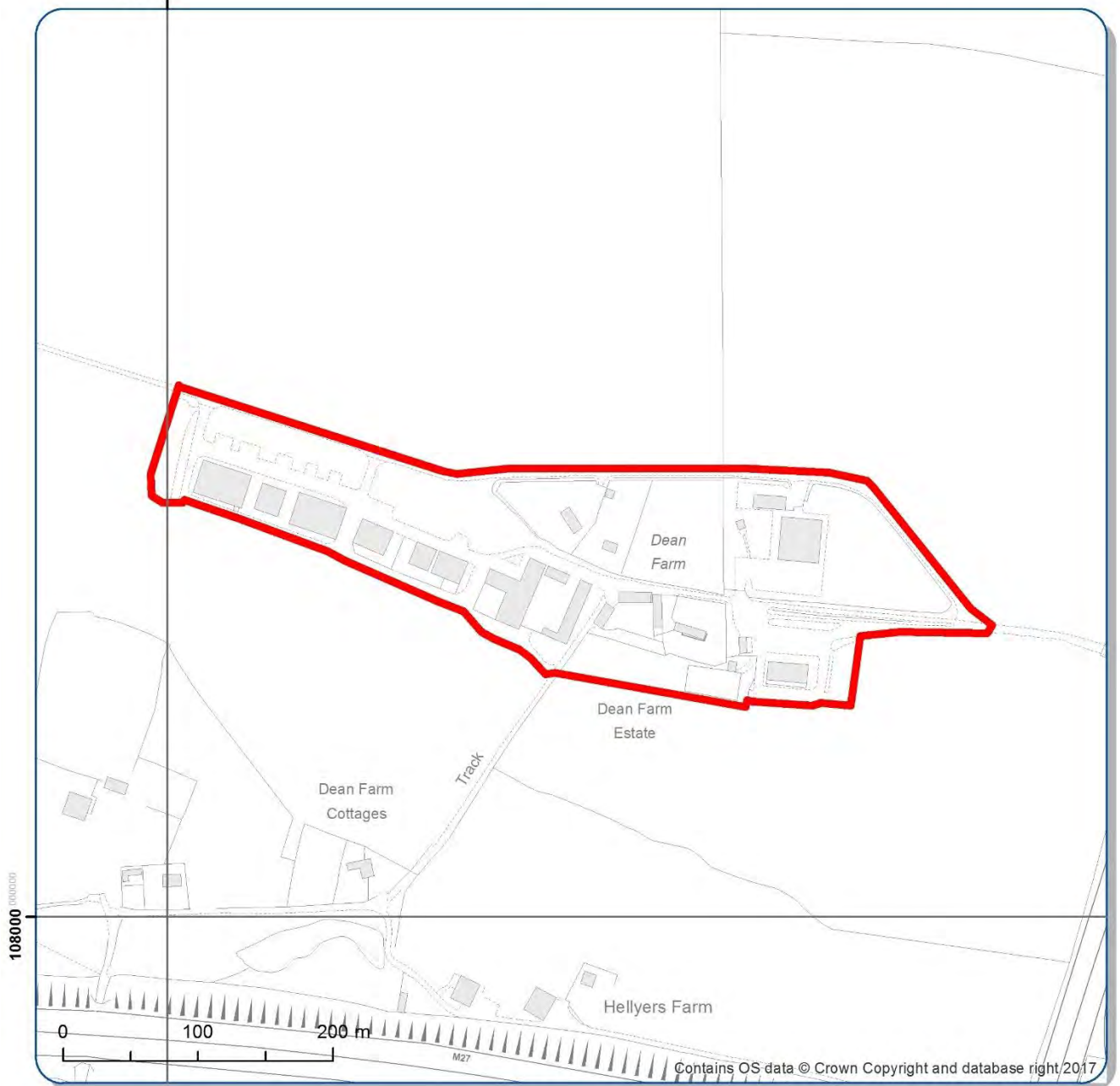
DEAN FARM ESTATE



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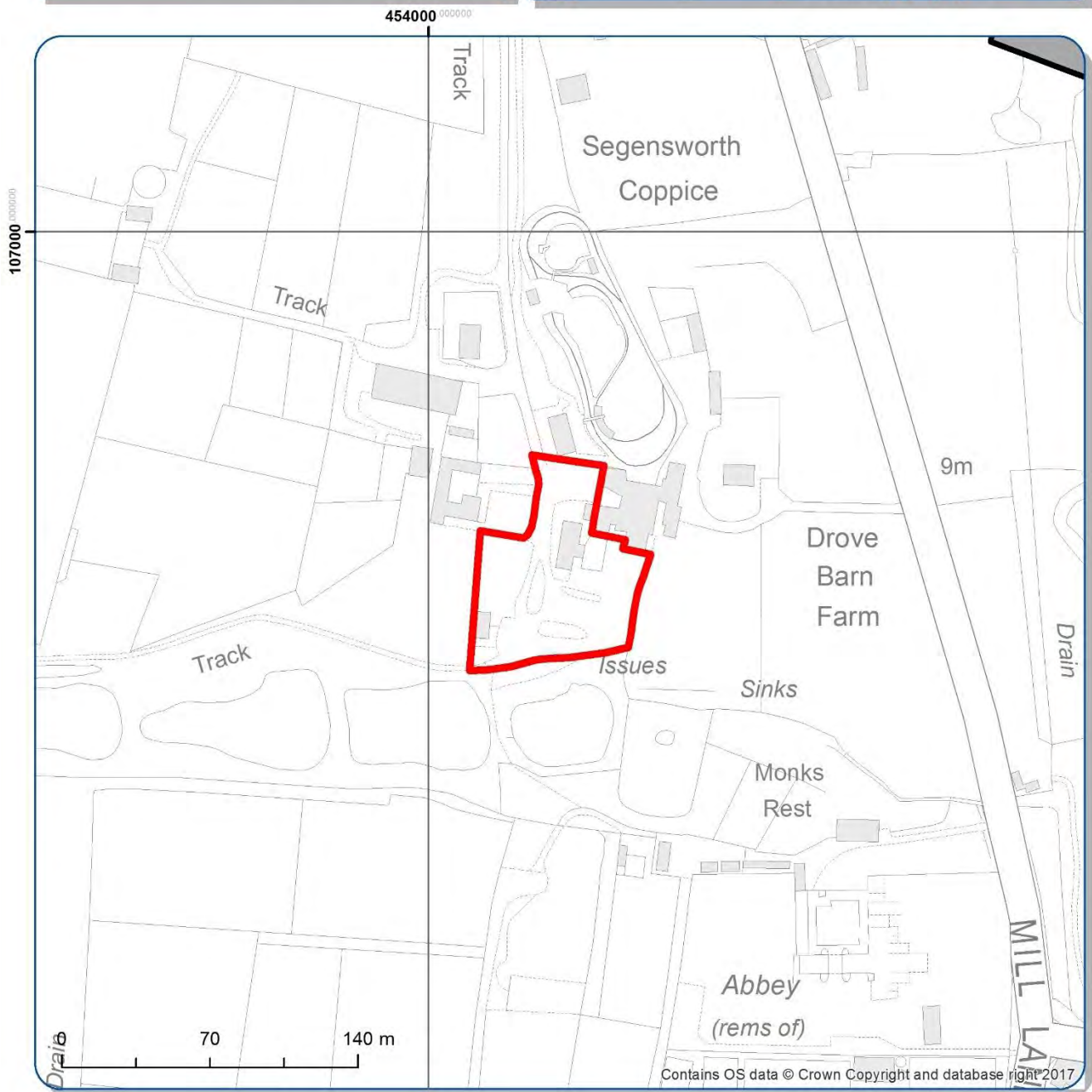


FAREHAM
BOROUGH COUNCIL

SITE ID 1274
CARRON ROW FARM



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FAREHAM
BOROUGH COUNCIL

SITE ID 1275

**ST MARGARETS LANE (NORTH &
SOUTH)**



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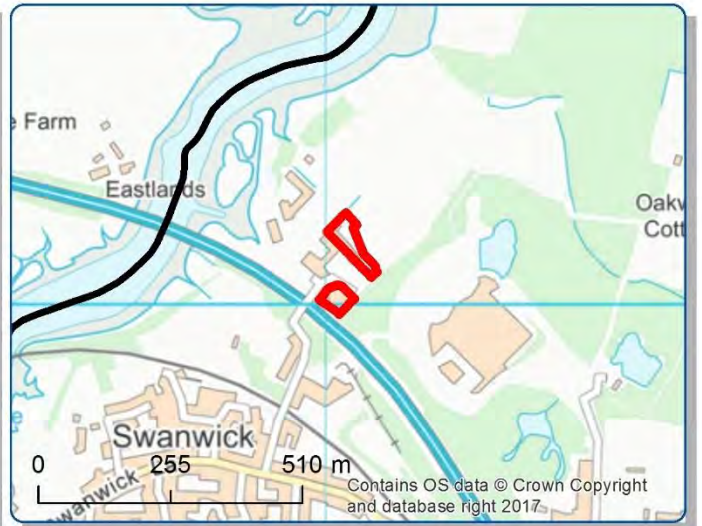
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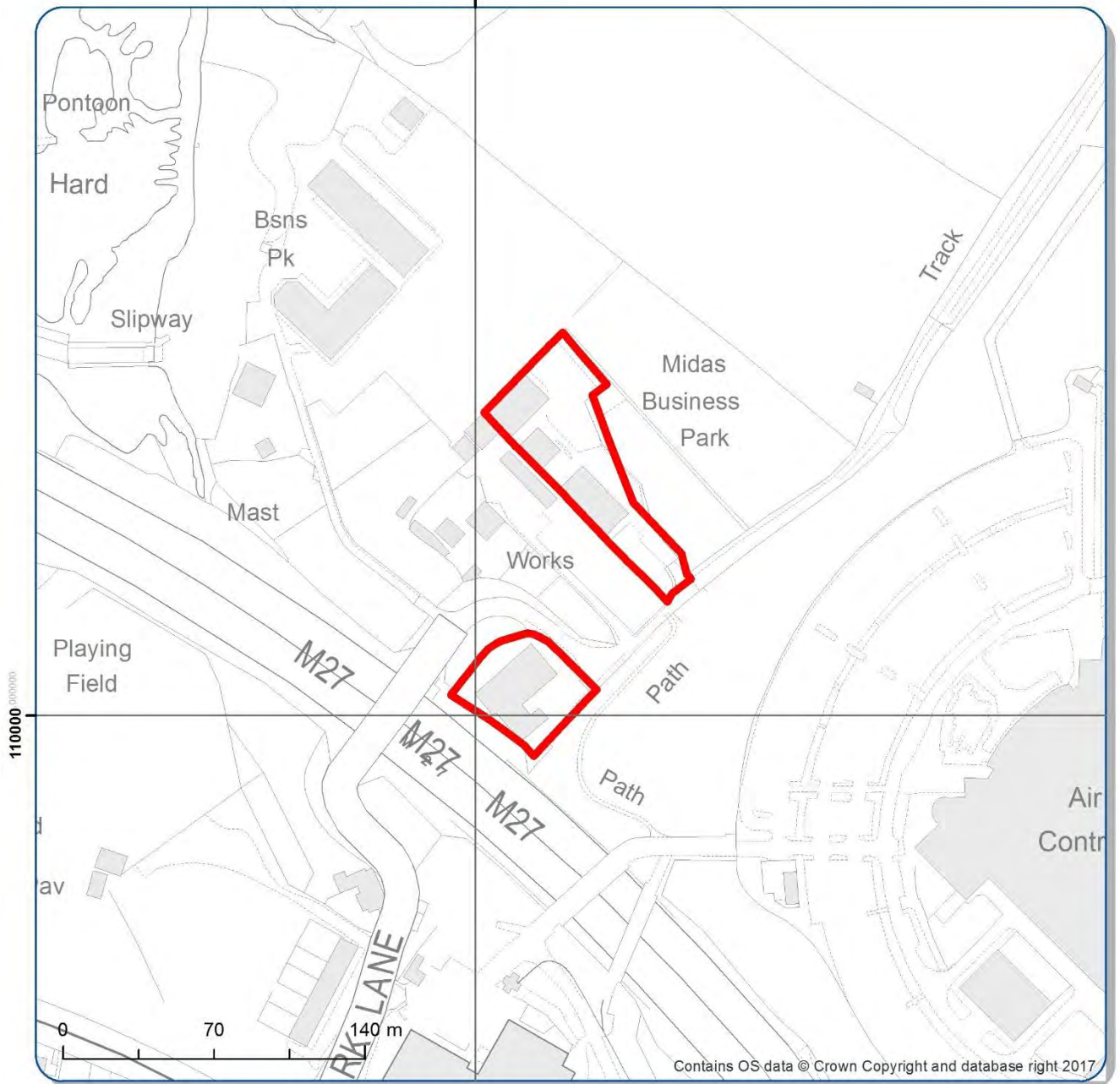
NORTH COAL PARK LANE



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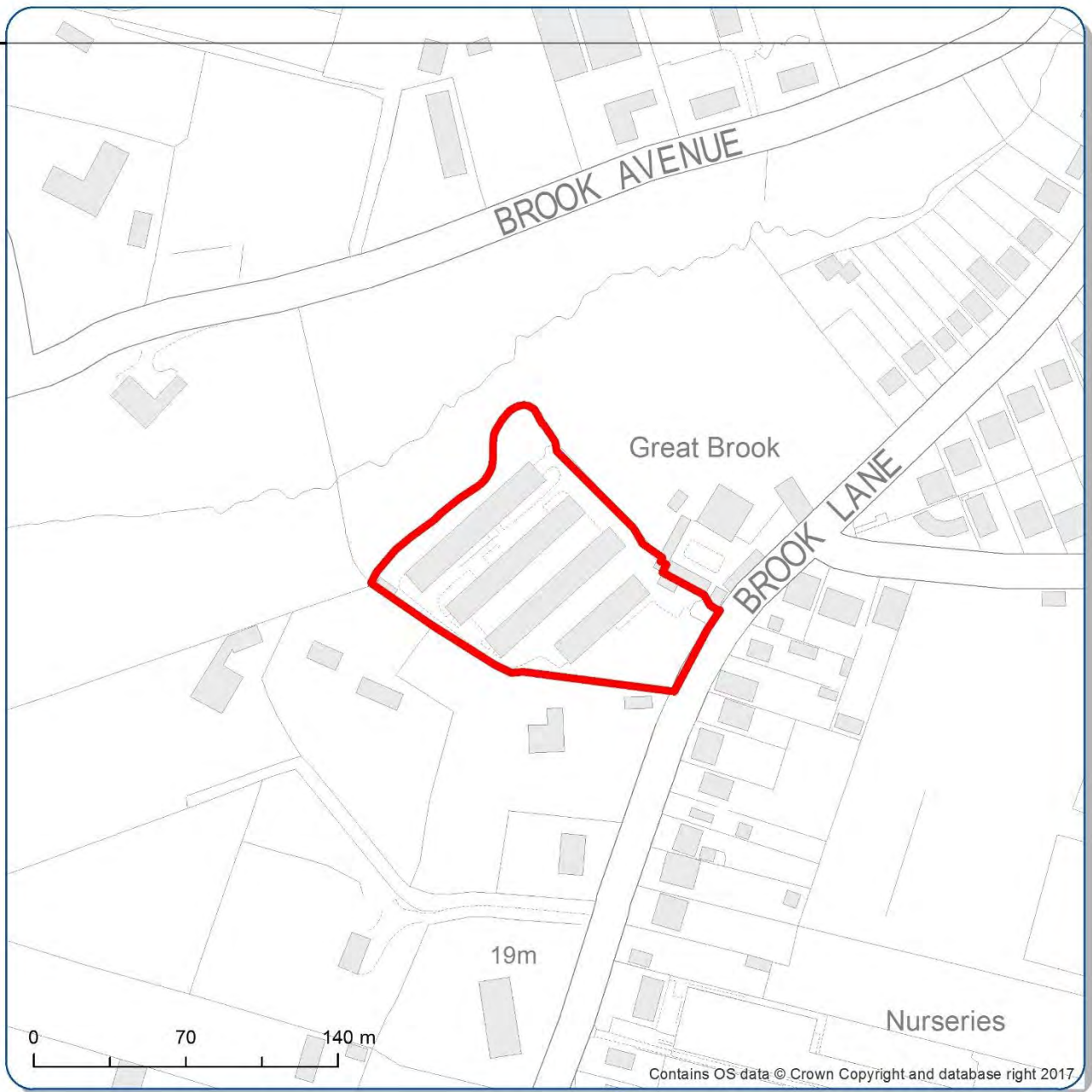
GREAT BROOK



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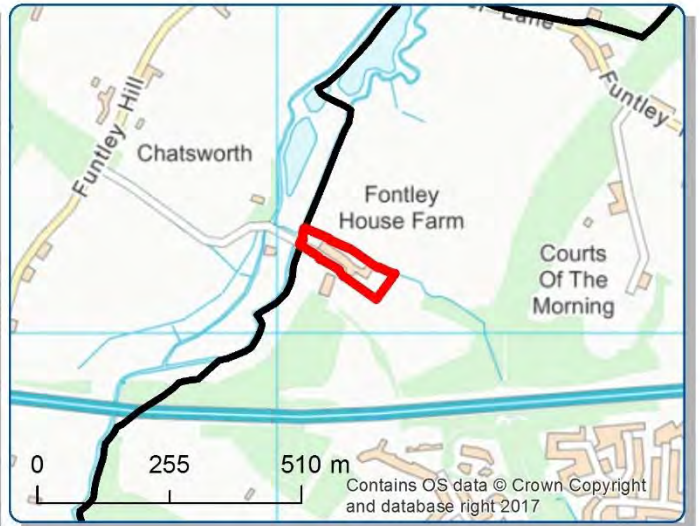
FAREHAM
BOROUGH COUNCIL

SITE ID 1281

FONTLEY FARM HOUSE



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FAREHAM
BOROUGH COUNCIL

SITE ID 2960

**PART OF FAREHAM POINT,
WICKHAM ROAD & NORTH END
OF HIGH STREET**



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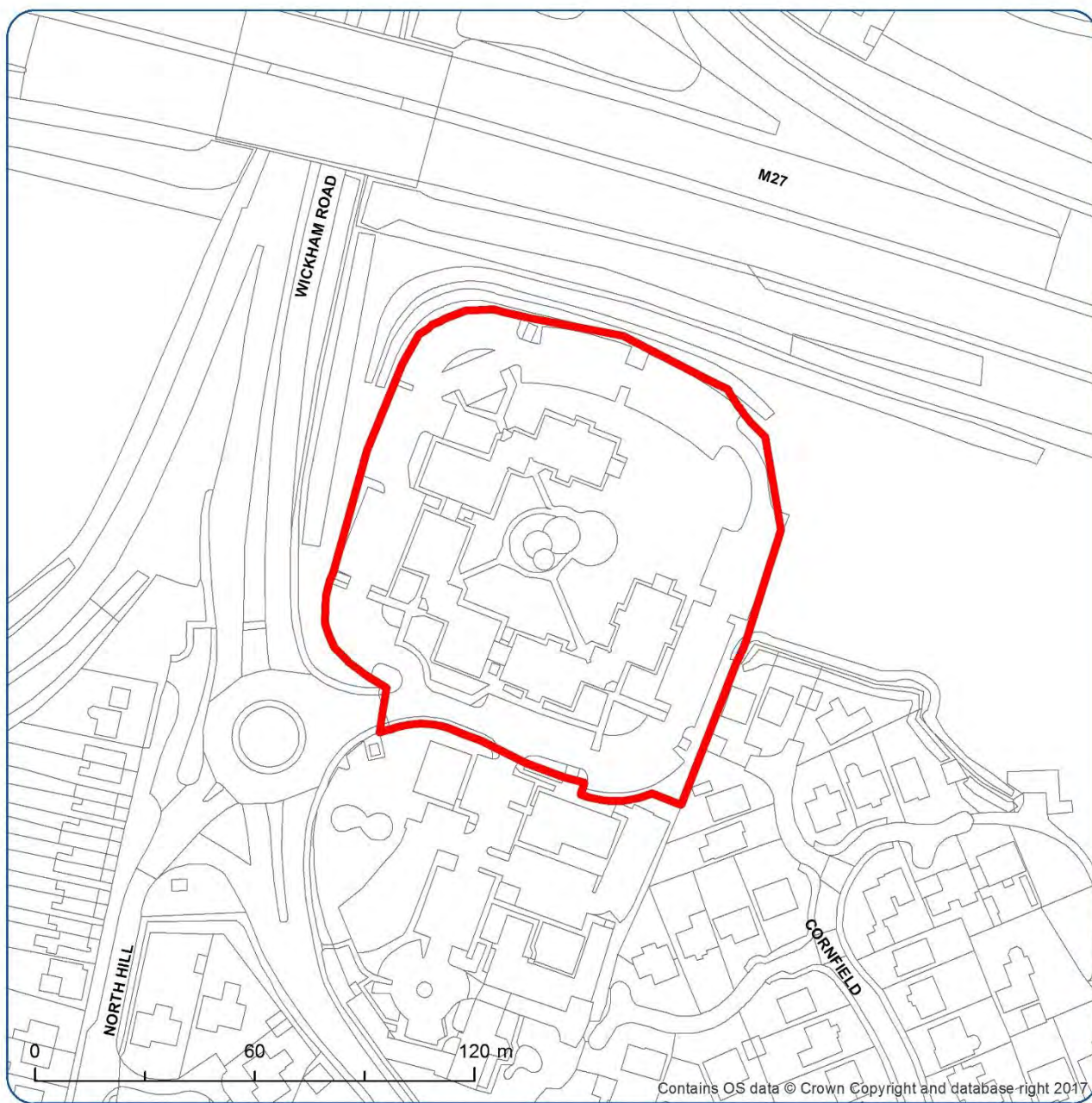
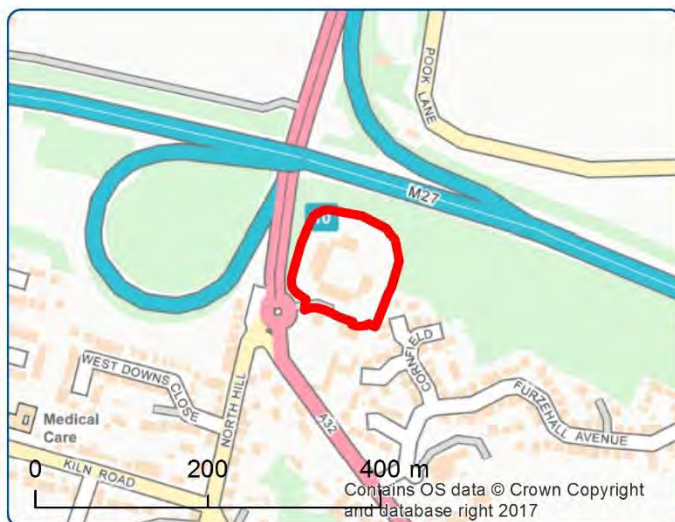
FAREHAM
BOROUGH COUNCIL

SITE ID 2963

**PART OF FURZE COURT,
WICKHAM ROAD**



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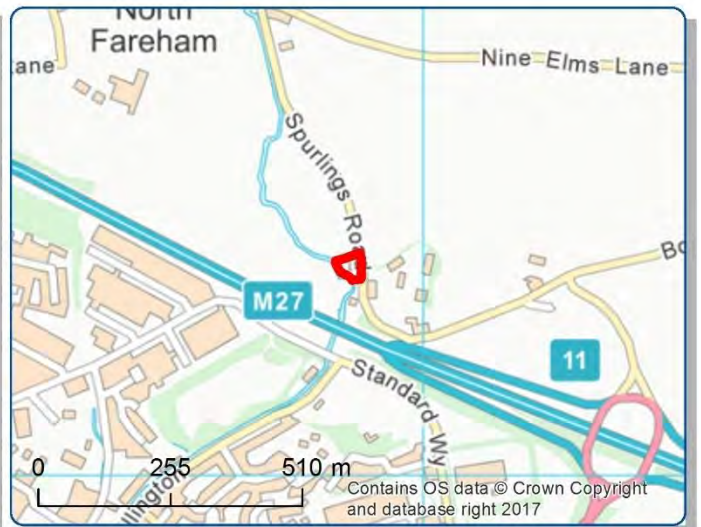


FAREHAM
BOROUGH COUNCIL

SITE ID 3141
RIVERSIDE YARD



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POTENTIAL SITES CONSIDERED SUITABLE FOR PROTECTION	
Site ID	Address
20	Land at Standard Way, Wallington
81	Park Gate Centre & North
124	Solent Business Park - Solent 2, Sarisbury
198	Civic Quarter, Fareham
205	Land north of St Margarets Roundabout, Titchfield
211	Fareham Station East
212	Fareham Station West
458	Portchester District Centre
1325	Crofton Conservatories, Fareham
1352	Land at Pinks Hill, Wallington
1365	Land adjoining Fort Wallington Industrial Estate, Wallington
1393	Locks Heath District Centre
1425	Market Quay Car Park
1914	Fareham Shopping Centre
1999	The Walled Garden, Cams Hall, Fareham
2001	Midpoint 27, Cartwright Drive
3011	Land at Down Barn Farm (East of Boarhunt Road), North Fareham
3022	Land West of Newgate Lane, Peel Common
3025	Little Park Farm
3033	Land at Peak Lane Nurseries, Stubbington
3034	Land rear of Waste Transfer Station, Wallington
3054	Land at Segensworth West
3055	Land at Southampton Road, Titchfield
3113	Daedalus East (Faraday Business Park)
3114	Daedalus West (Swordfish Business Park)
3125	Land at Segensworth Roundabout

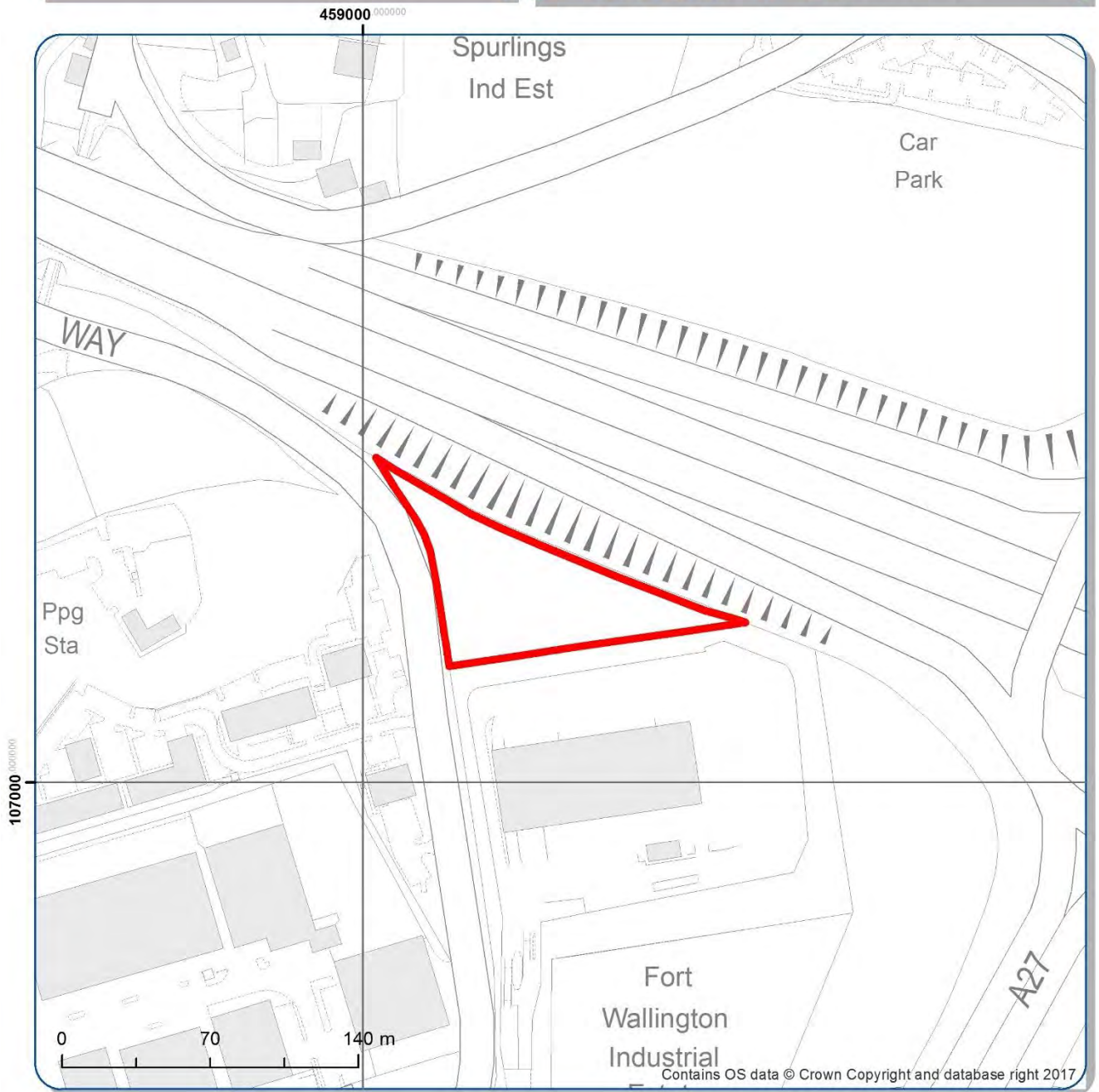
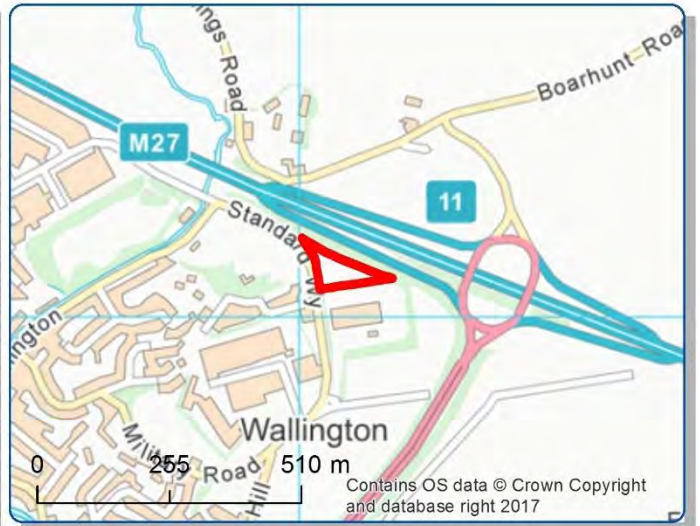
FAREHAM
BOROUGH COUNCIL

SITE ID 20

STANDARD WAY, WALLINGTON



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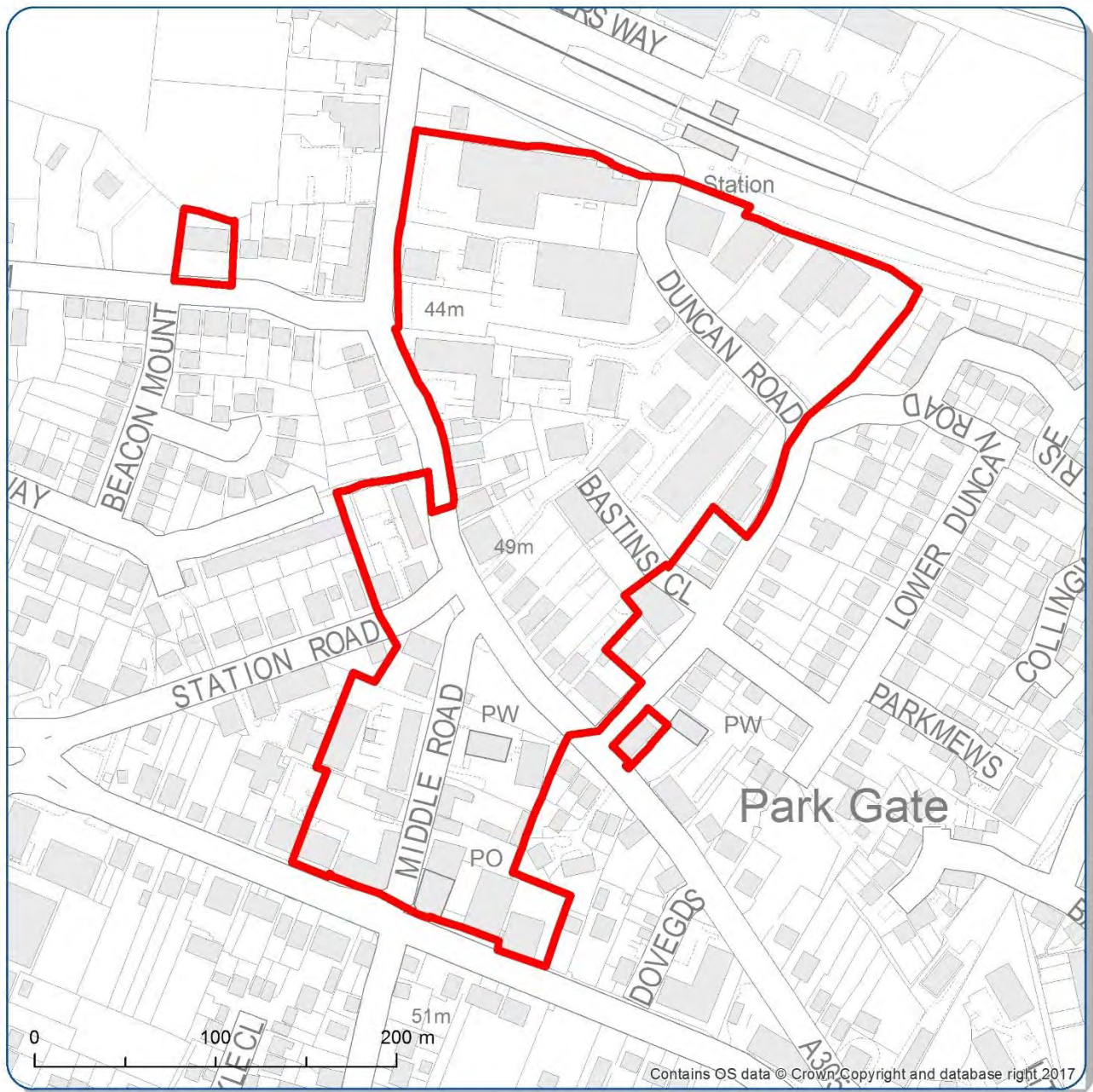
FAREHAM
BOROUGH COUNCIL

SITE ID 81

PARK GATE CENTRE & NORTH



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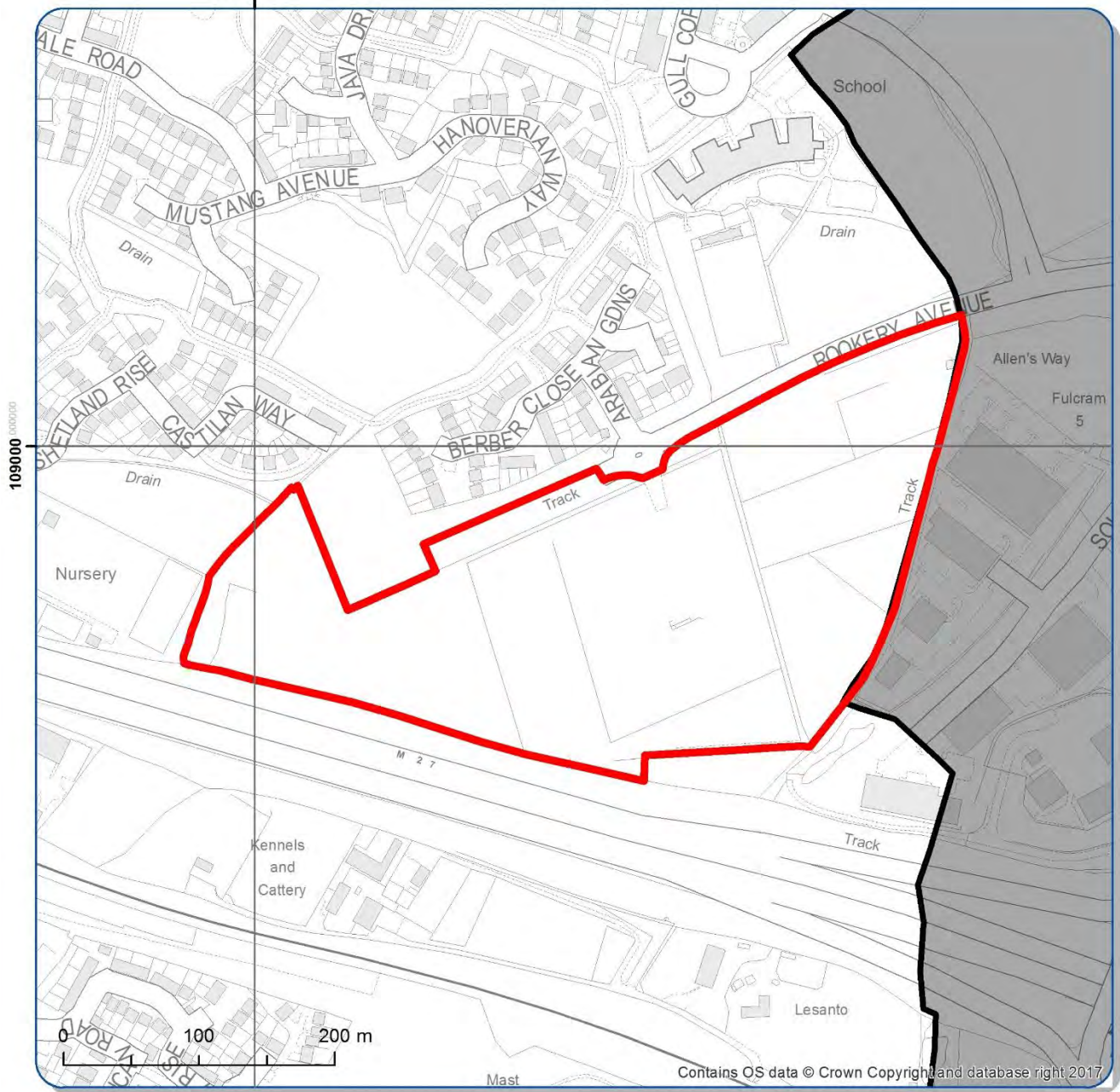
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SOLENT 2, WHITELEY



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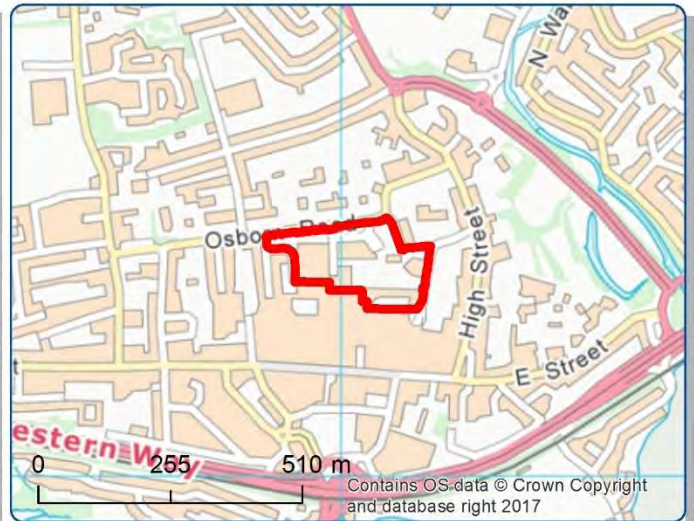
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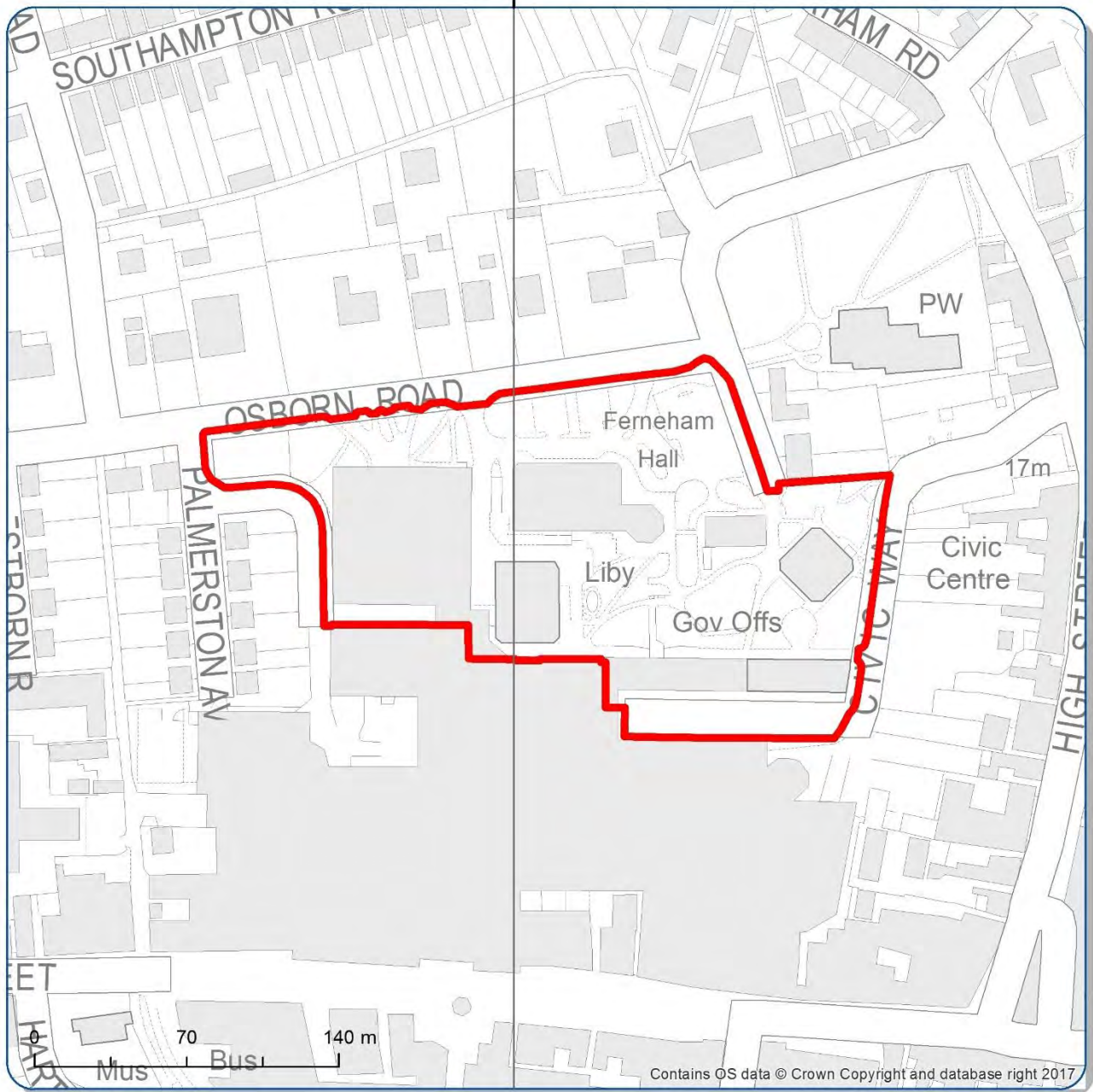
CIVIC QUARTER, FAREHAM



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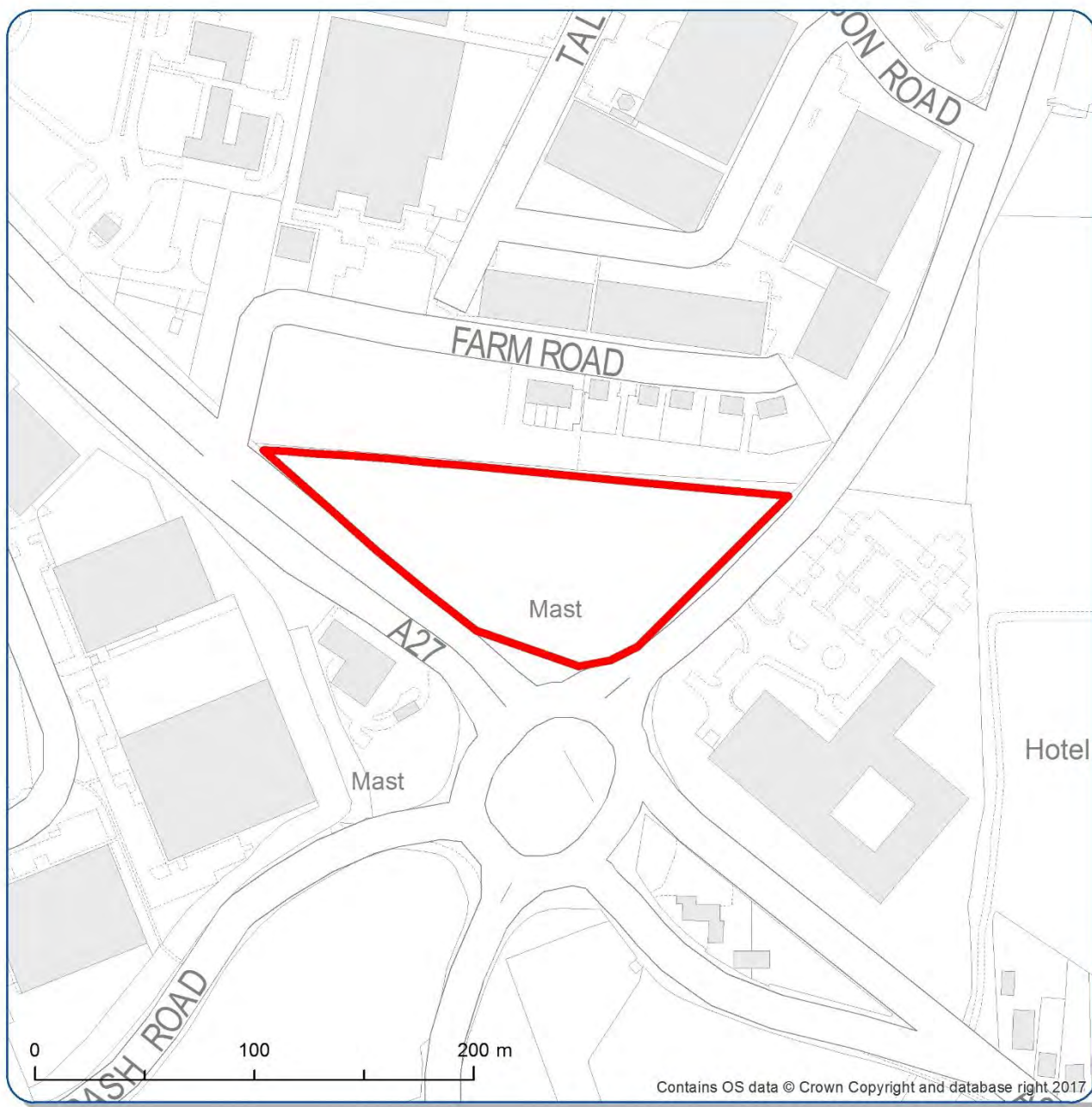
FAREHAM
BOROUGH COUNCIL

SITE ID 205

**LAND NORTH OF ST.
MARGARET'S ROUNDABOUT,
TITCHFIELD**



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FAREHAM BOROUGH COUNCIL

SITE ID 211

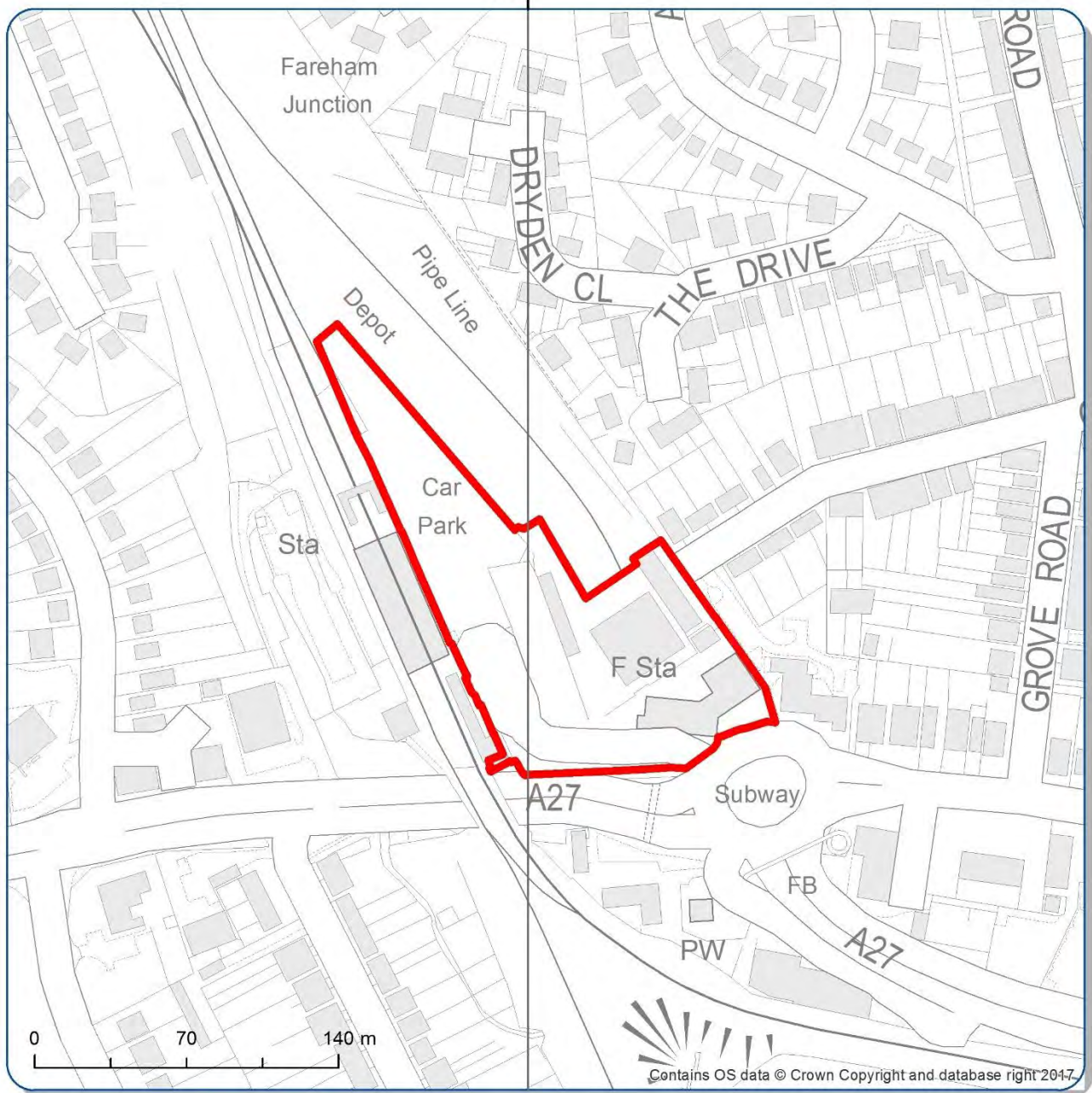
FAREHAM STATION EAST



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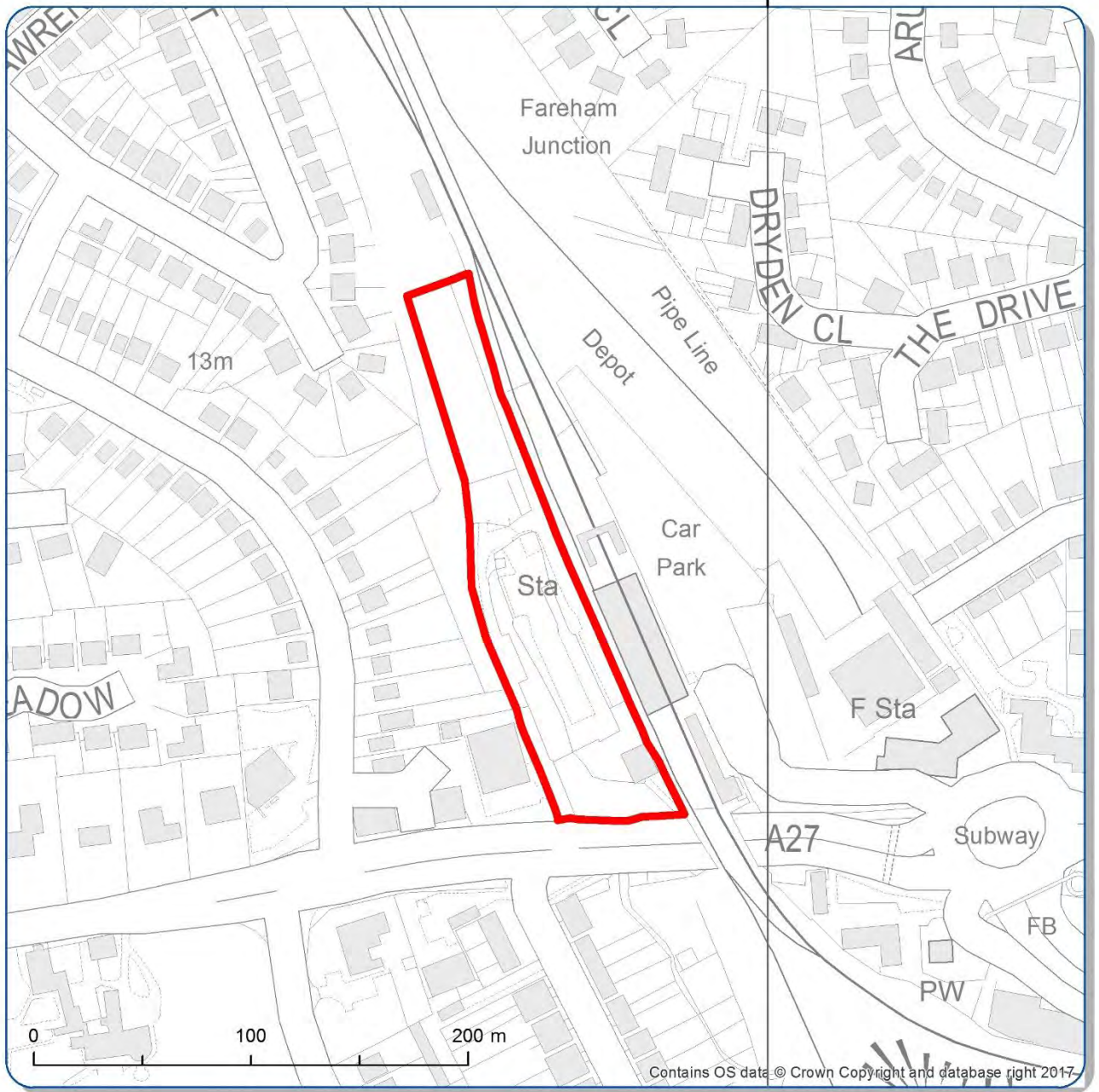
FAREHAM STATION WEST



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FAREHAM
BOROUGH COUNCIL

SITE ID 458

**PORTCHESTER DISTRICT
CENTRE**



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BOROUGH COUNCIL

SITE ID 1325

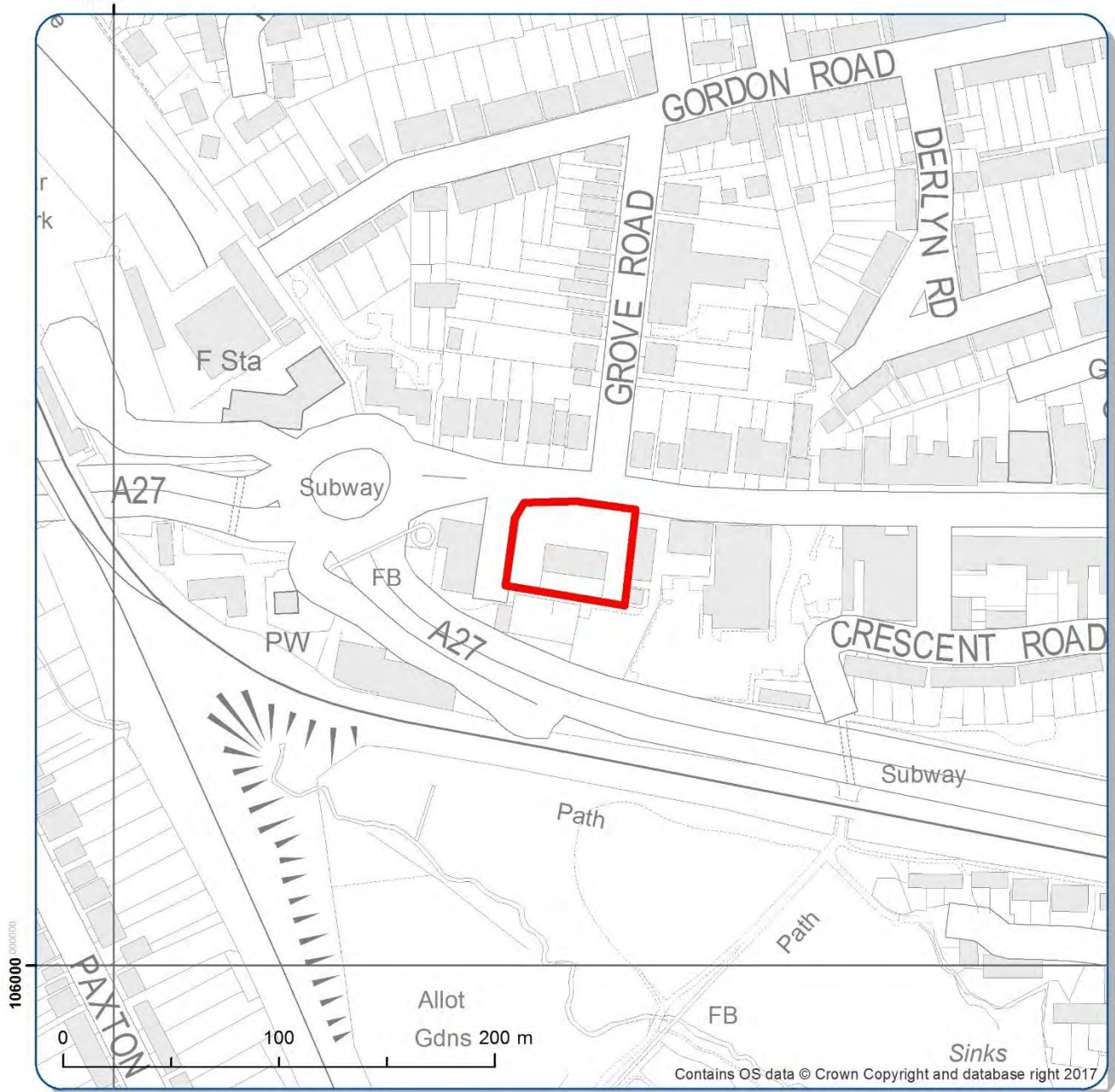
**CROFTON CONSERVATORIES,
FAREHAM**



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FAREHAM
BOROUGH COUNCIL

SITE ID 1352

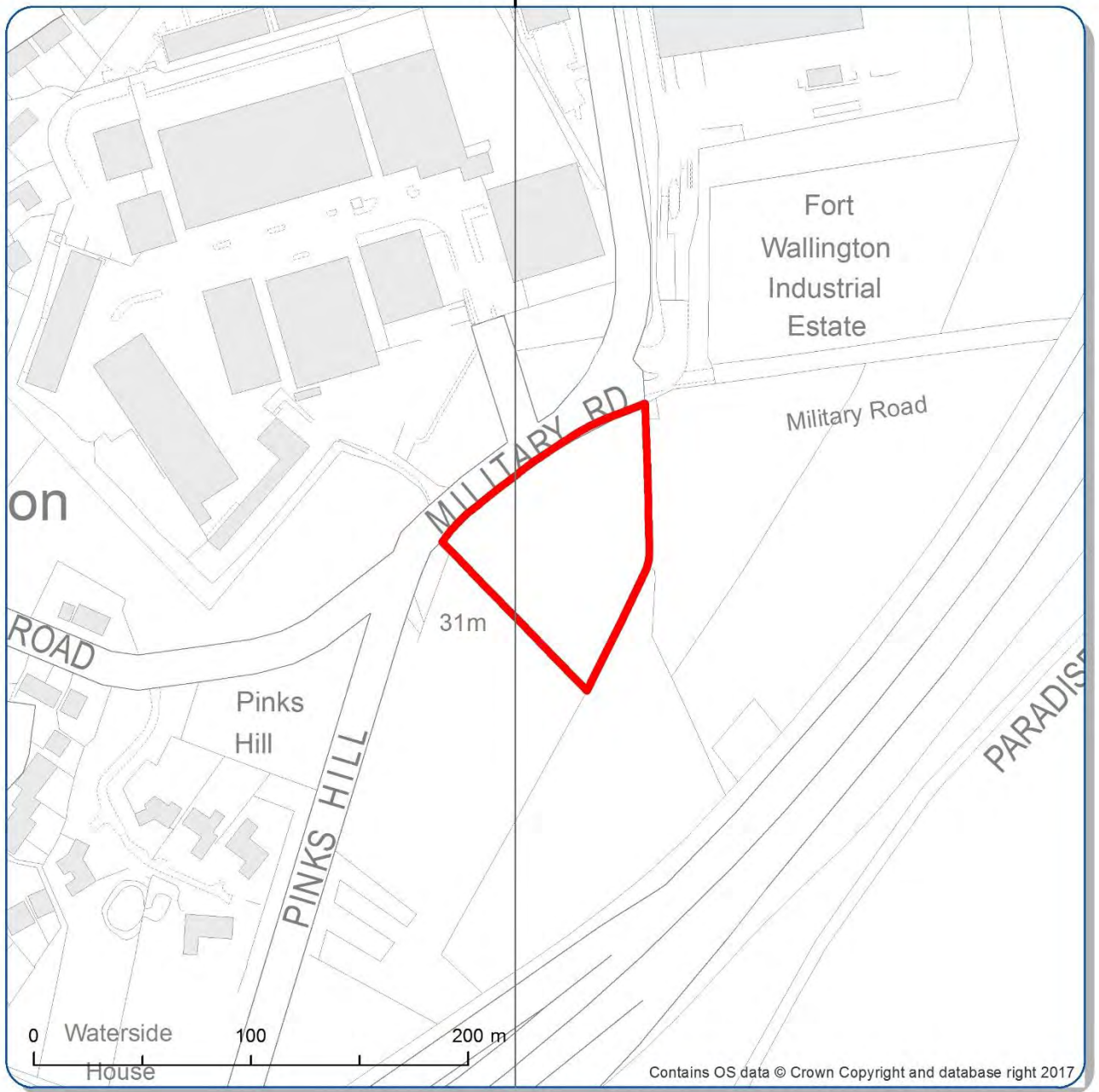
**LAND AT PINKS HILL,
WALLINGTON**



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FAREHAM
BOROUGH COUNCIL

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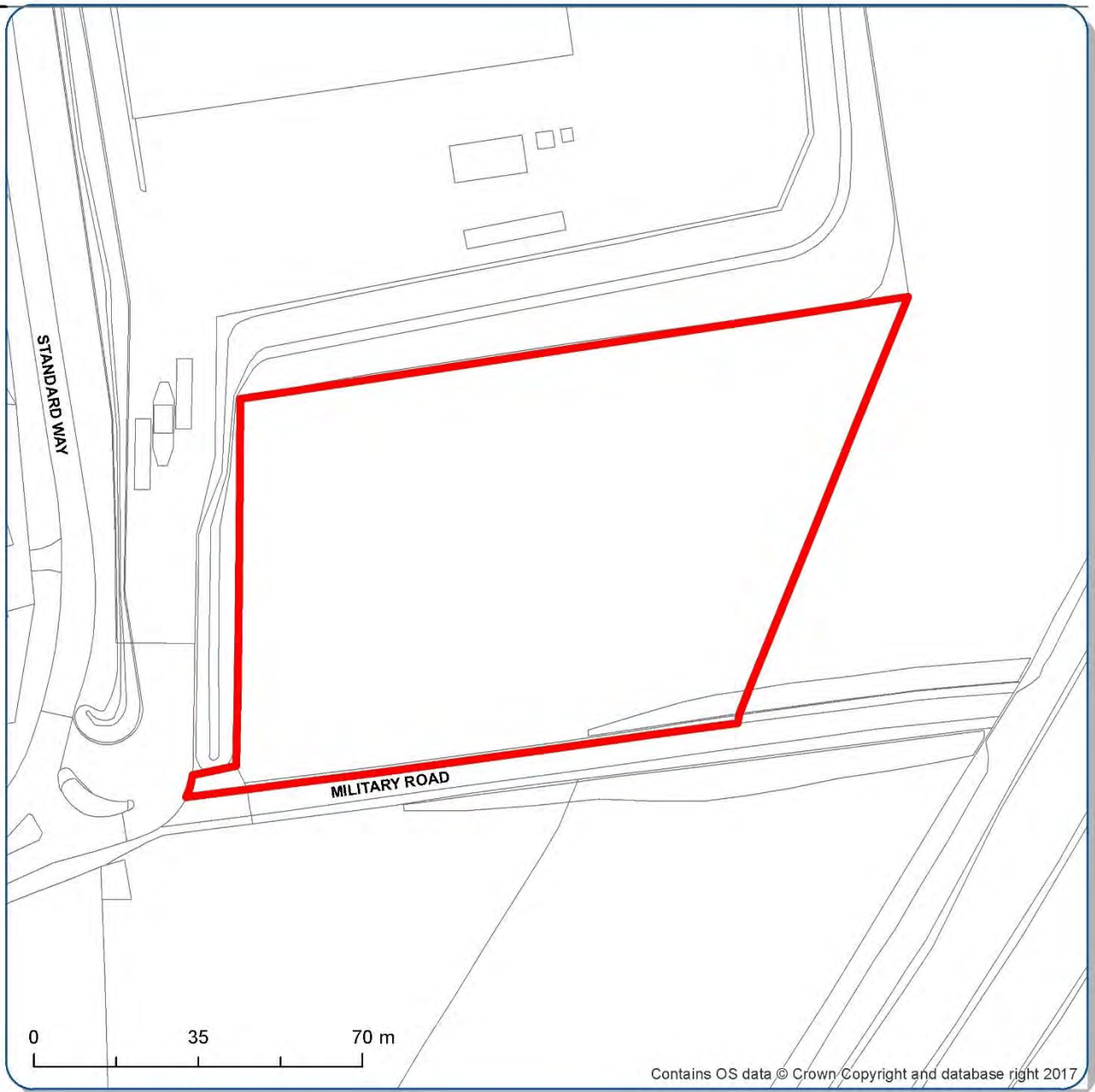
**LAND ADJOINING FORT
WALLINGTON INDUSTRIAL
ESTATE**



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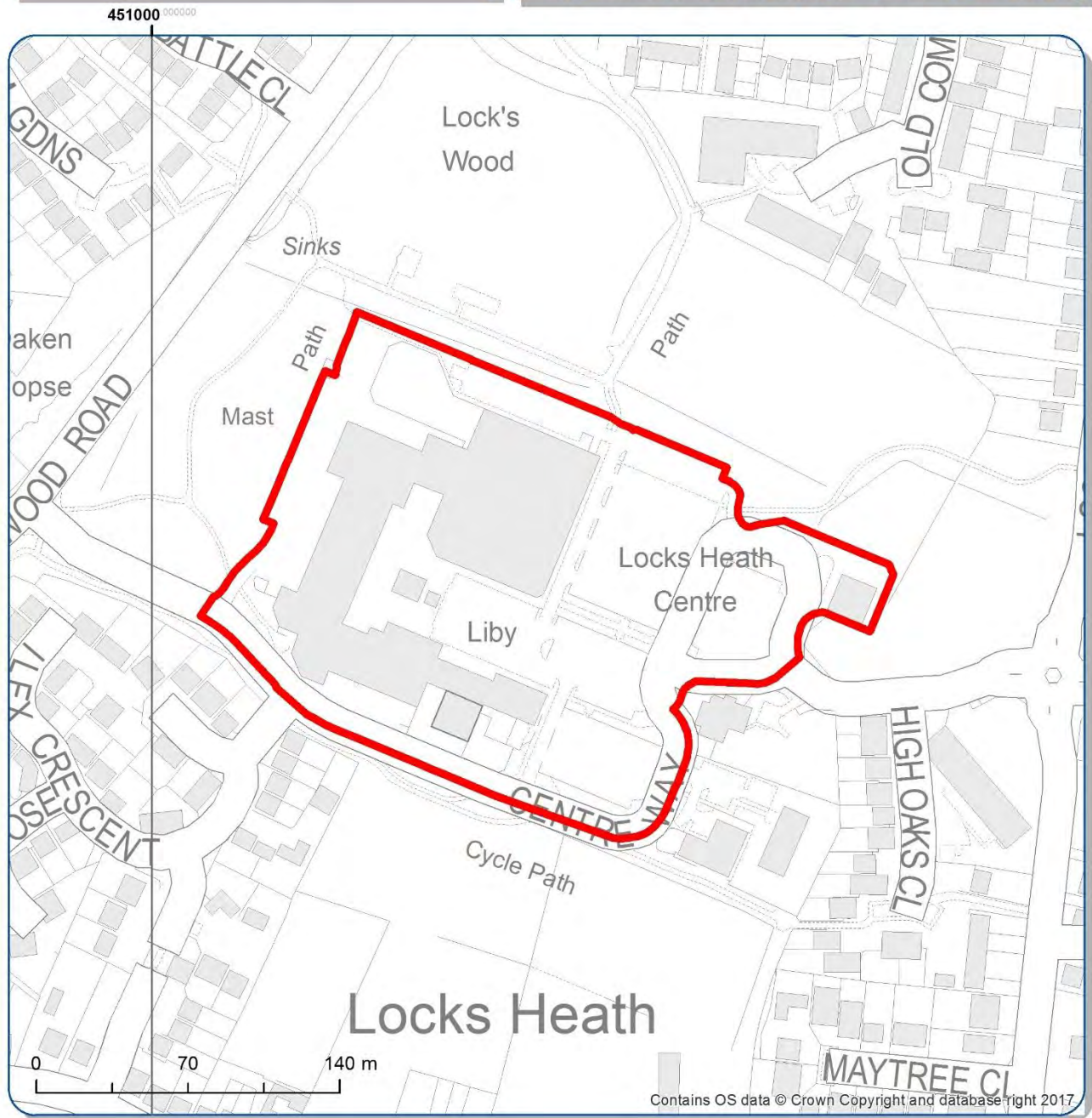
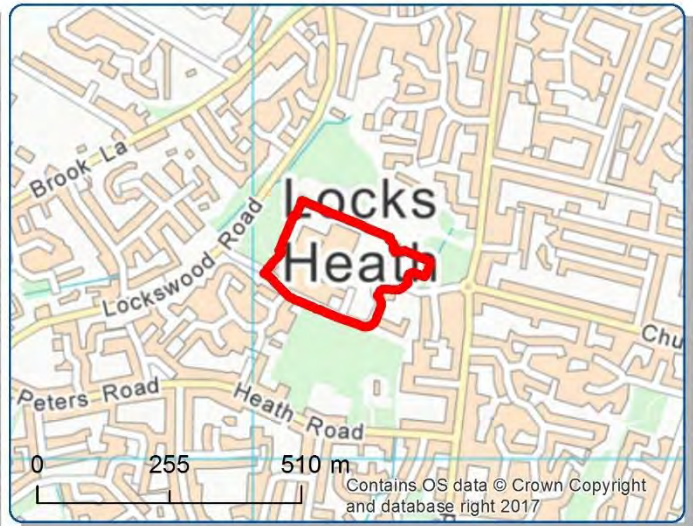
FAREHAM
BOROUGH COUNCIL

SITE ID 1393

**LOCKS HEATH CENTRE (AND
SURROUNDING AREA)**



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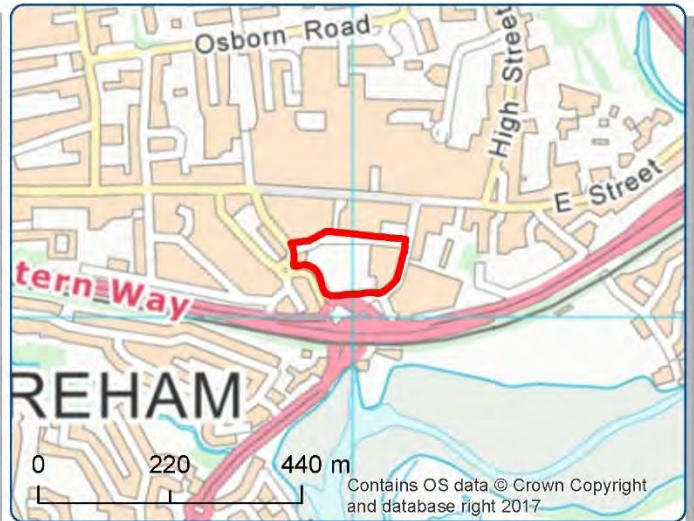
FAREHAM
BOROUGH COUNCIL

SITE ID 1425

MARKET QUAY, FAREHAM



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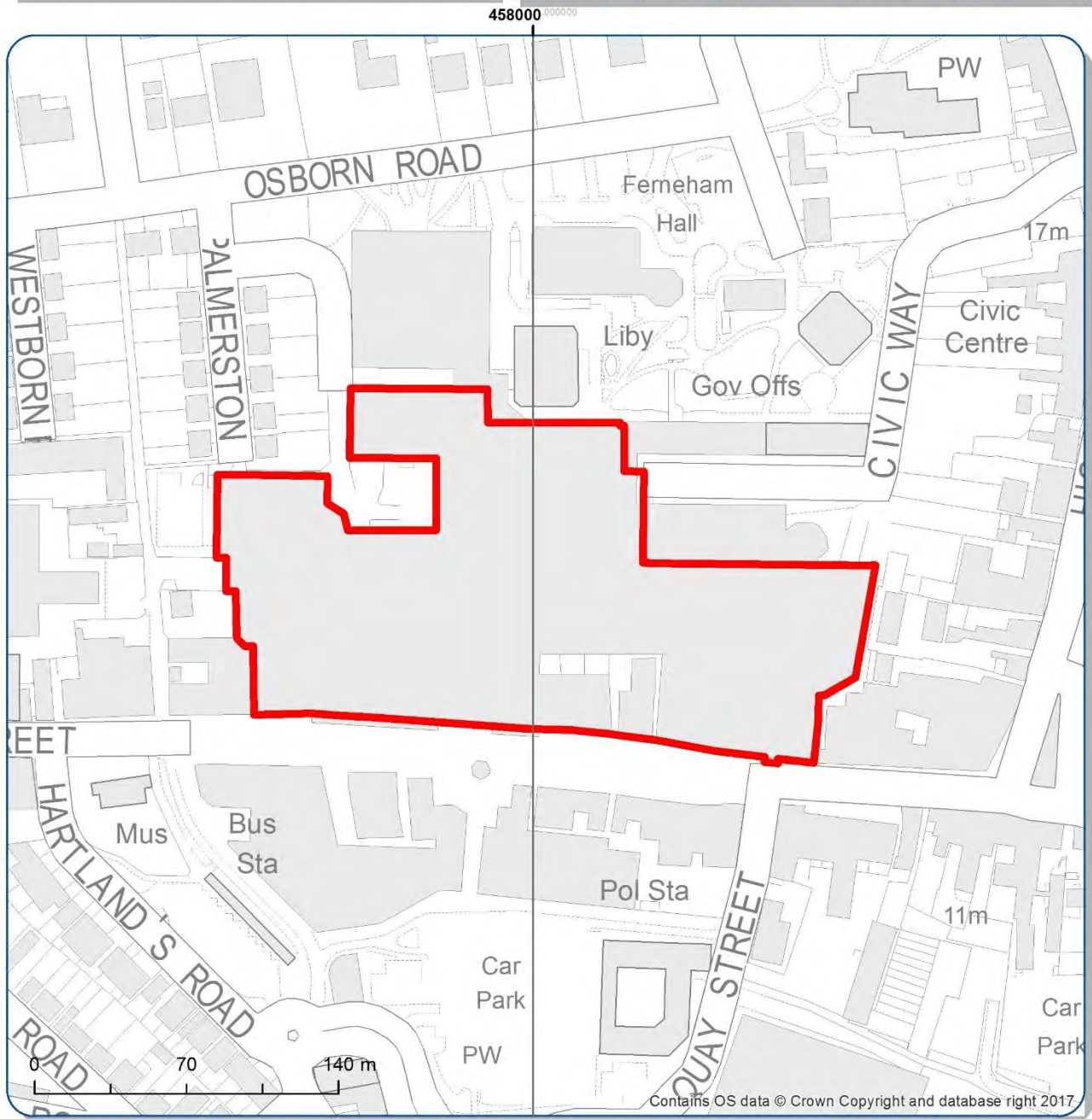
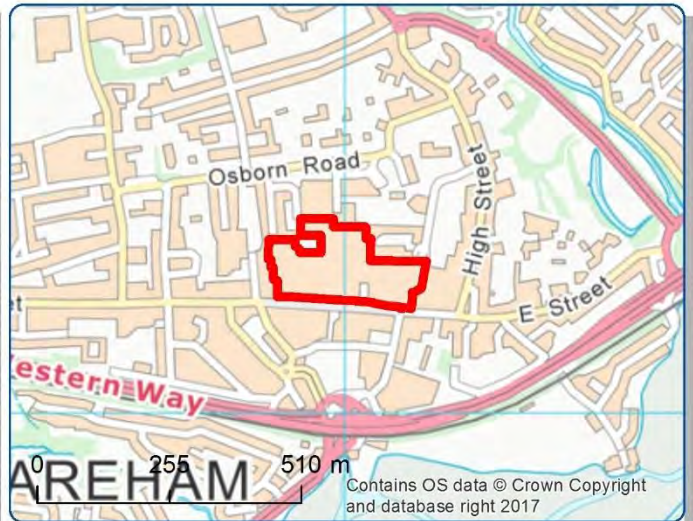
FAREHAM
BOROUGH COUNCIL

SITE ID 1914

FAREHAM SHOPPING CENTRE



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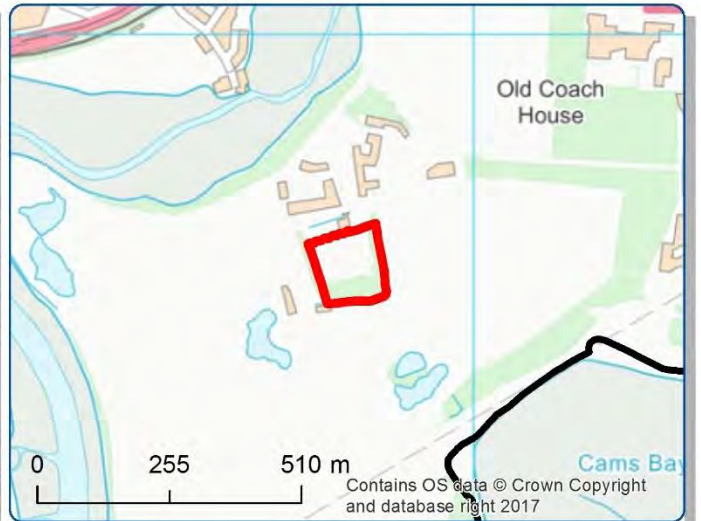
FAREHAM
BOROUGH COUNCIL

SITE ID 1999

**THE WALLED GARDEN, CAMS
HALL**



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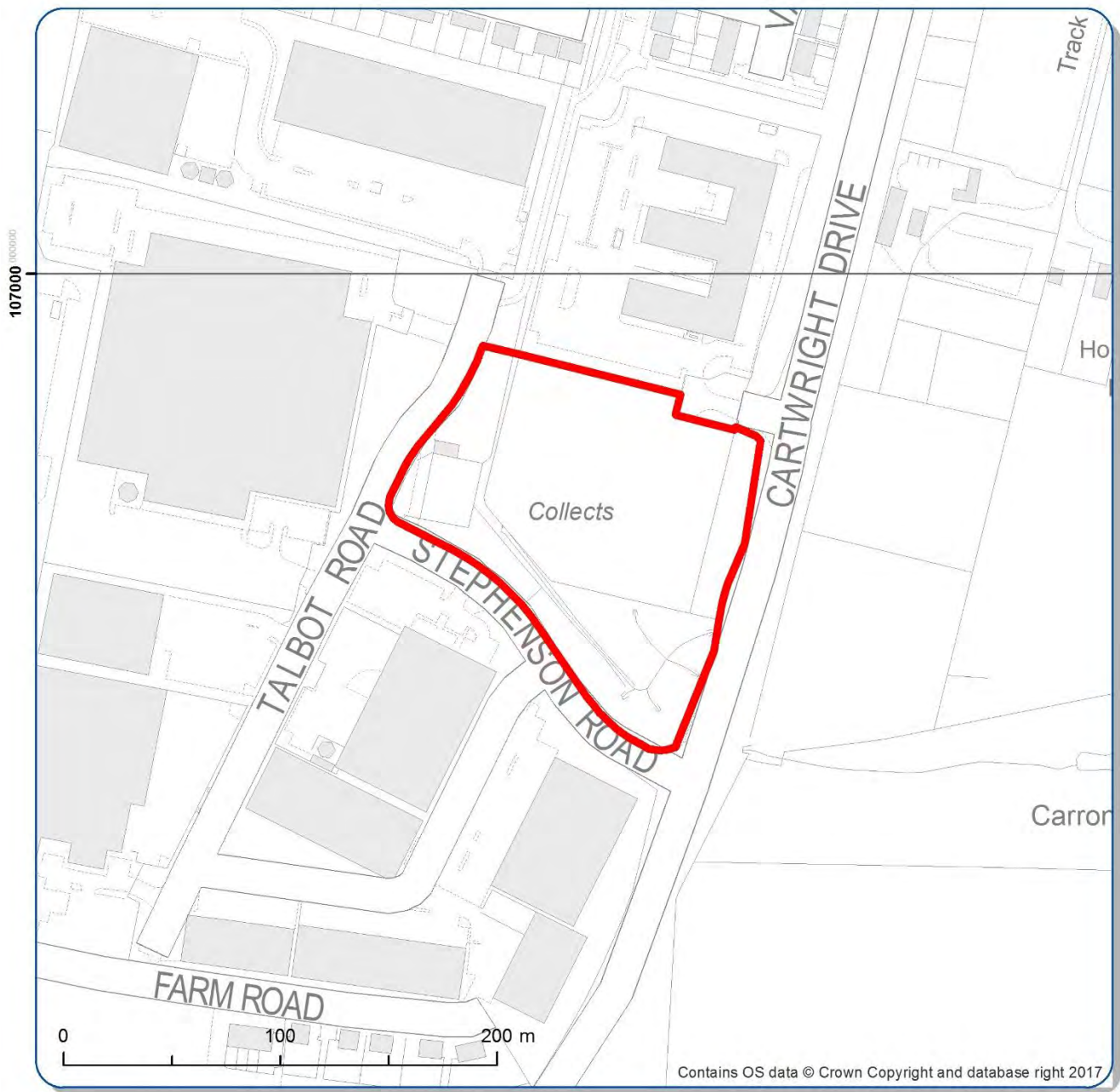
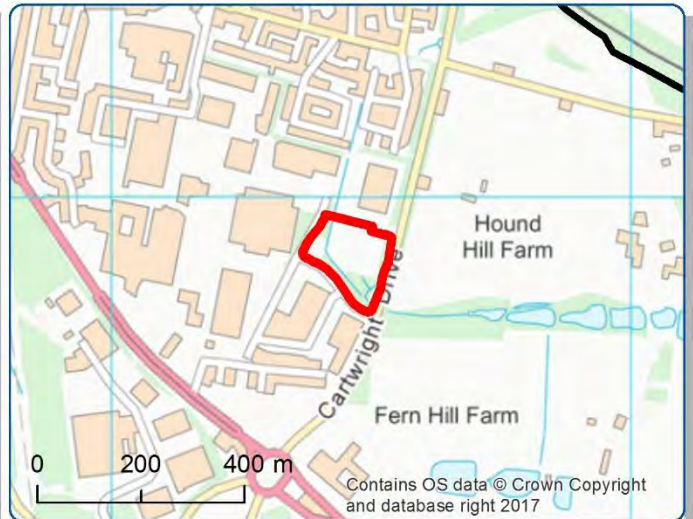
FAREHAM
BOROUGH COUNCIL

SITE ID 2001

**MIDPOINT 27, CARTWRIGHT
DRIVE, SEGENSWORTH SOUTH**



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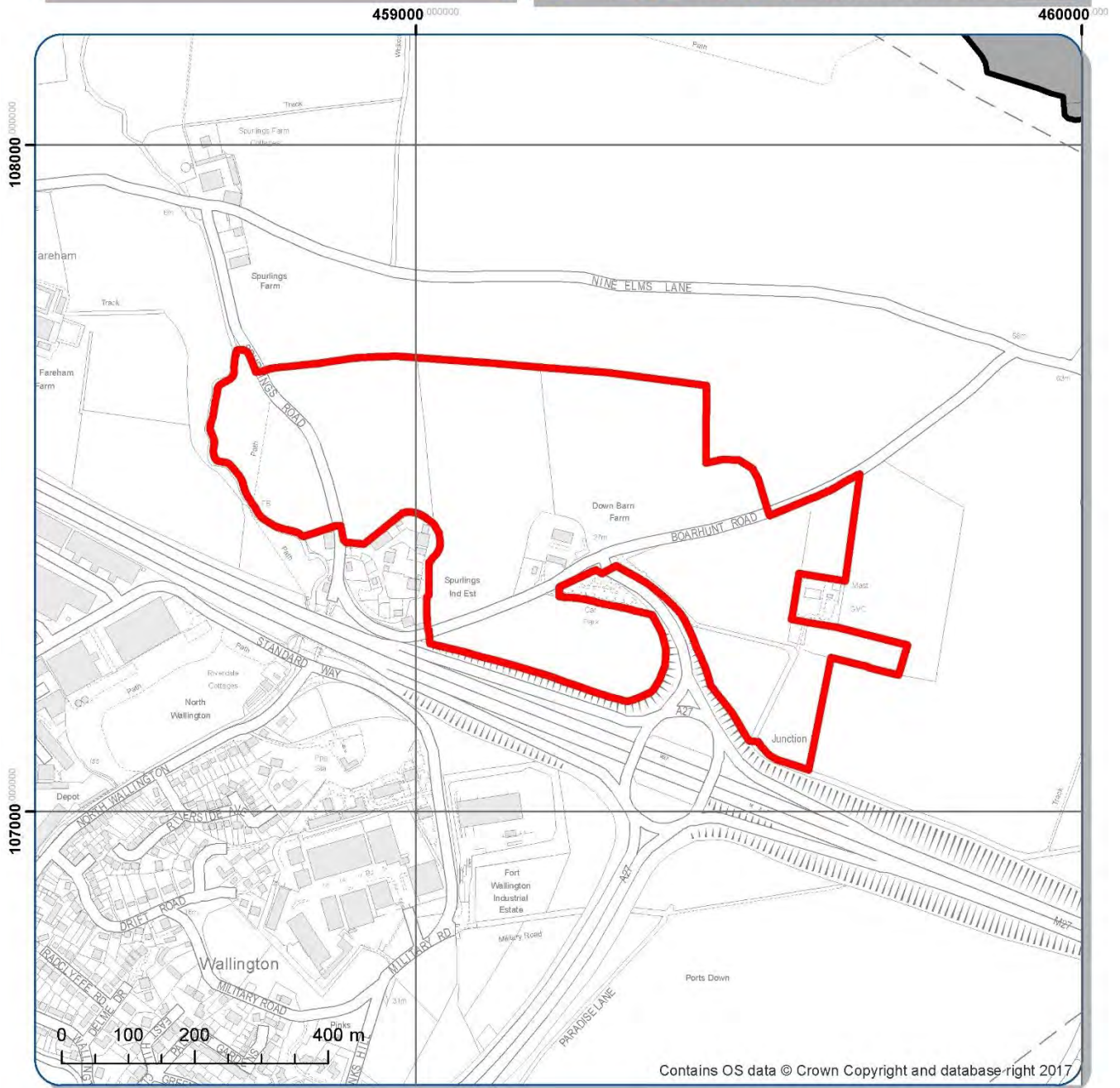
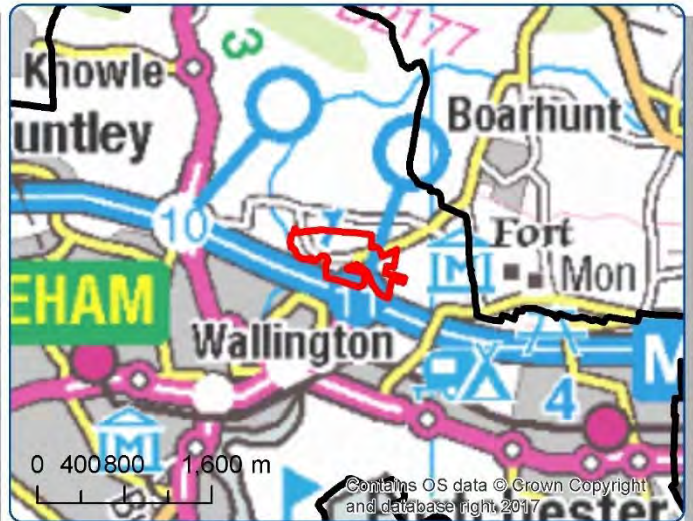
FAREHAM
BOROUGH COUNCIL

SITE ID 3011

LAND AT DOWN BARN FARM



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FAREHAM
BOROUGH COUNCIL

SITE ID 3022

**LAND WEST OF NEWGATE LANE,
STUBBINGTON**



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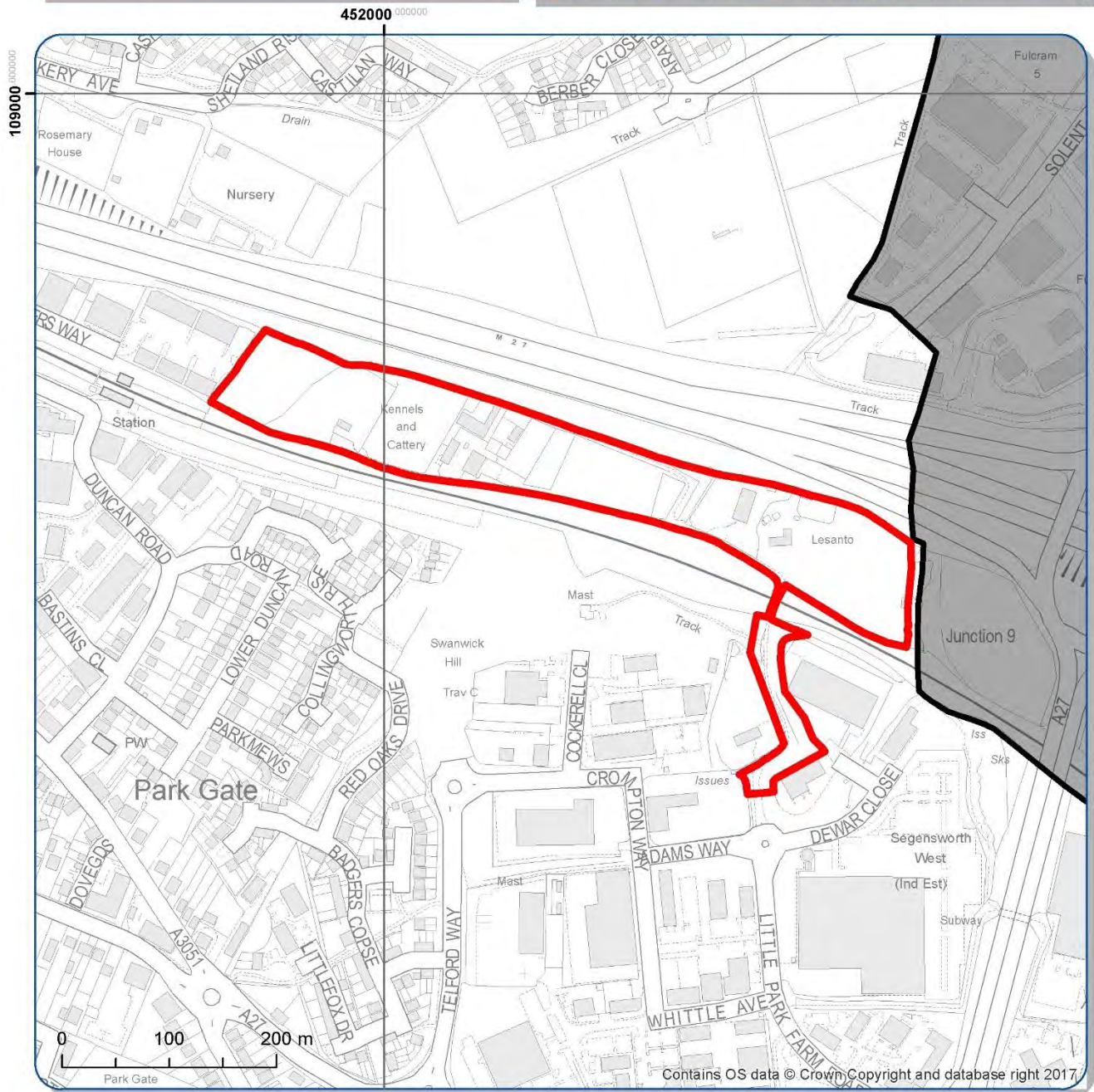
FAREHAM
BOROUGH COUNCIL

SITE ID 3025

LITTLE PARK FARM, PARK GATE



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FAREHAM
BOROUGH COUNCIL

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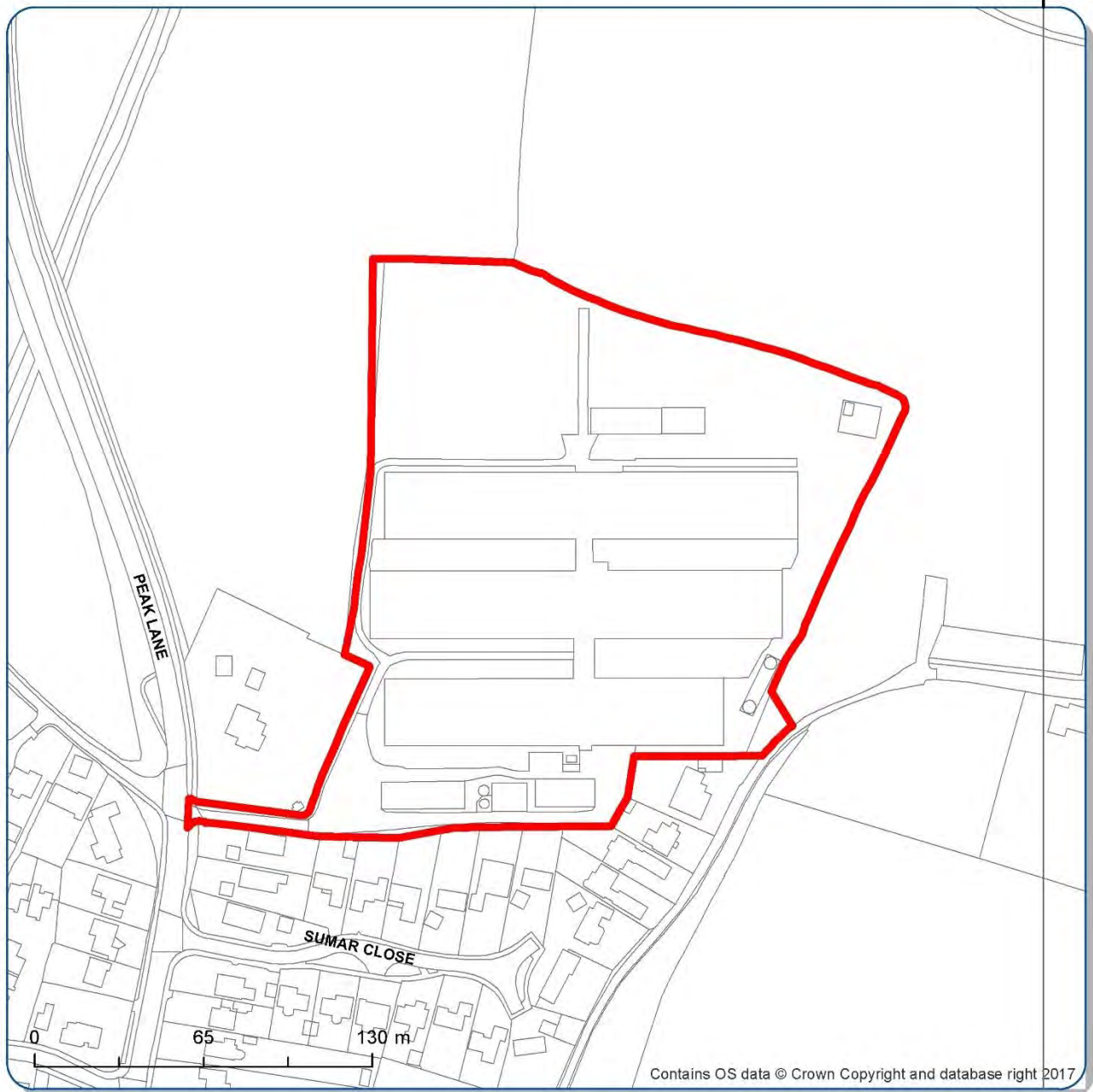
**LAND AT PEAK LANE
NURSERIES, STUBBINGTON**



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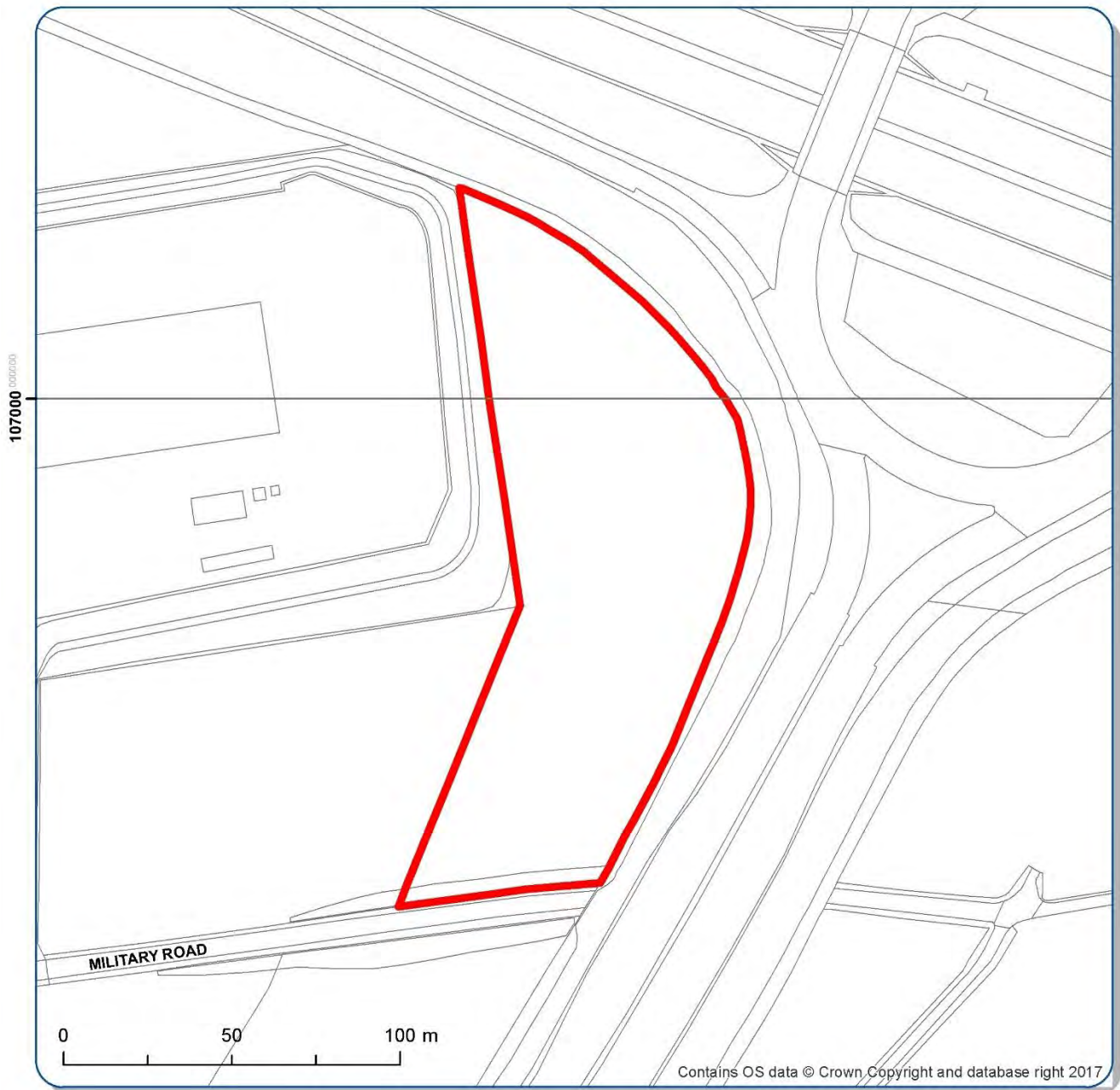
FAREHAM
BOROUGH COUNCIL

SITE ID 3034

**LAND REAR OF WTS,
WALLINGTON**



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FAREHAM
BOROUGH COUNCIL

SITE ID 3054

**LAND AT SEGENSWORTH WEST,
FAREHAM**



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FAREHAM
BOROUGH COUNCIL

SITE ID 3055

**LAND AT SOUTHAMPTON ROAD,
TITCHFIELD**



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FAREHAM
BOROUGH COUNCIL

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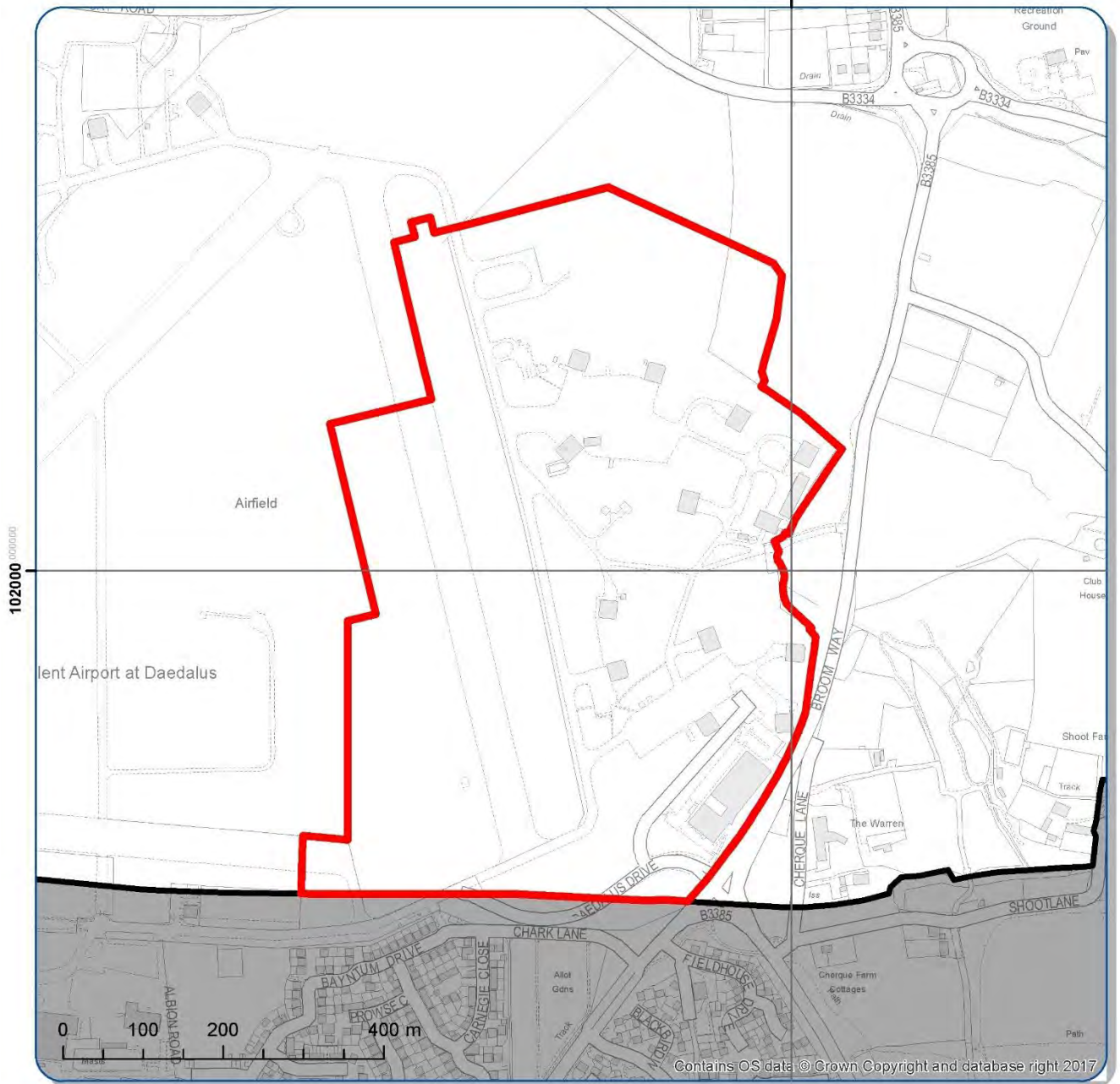
**FARADAY BUSINESS PARK,
DAEDALUS EAST**



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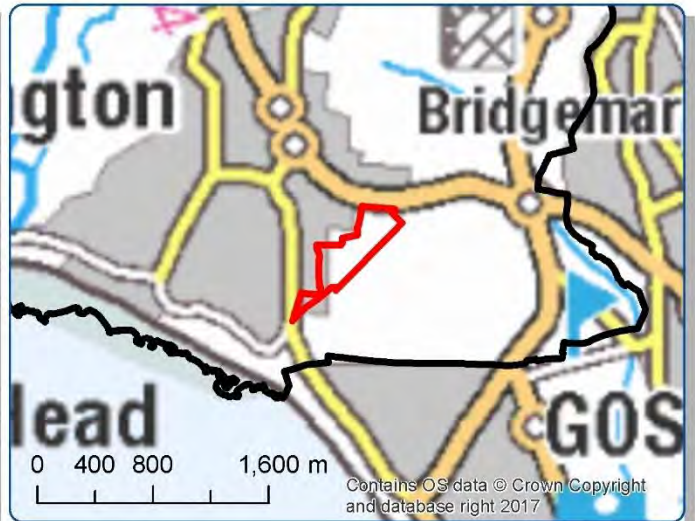
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BOROUGH COUNCIL

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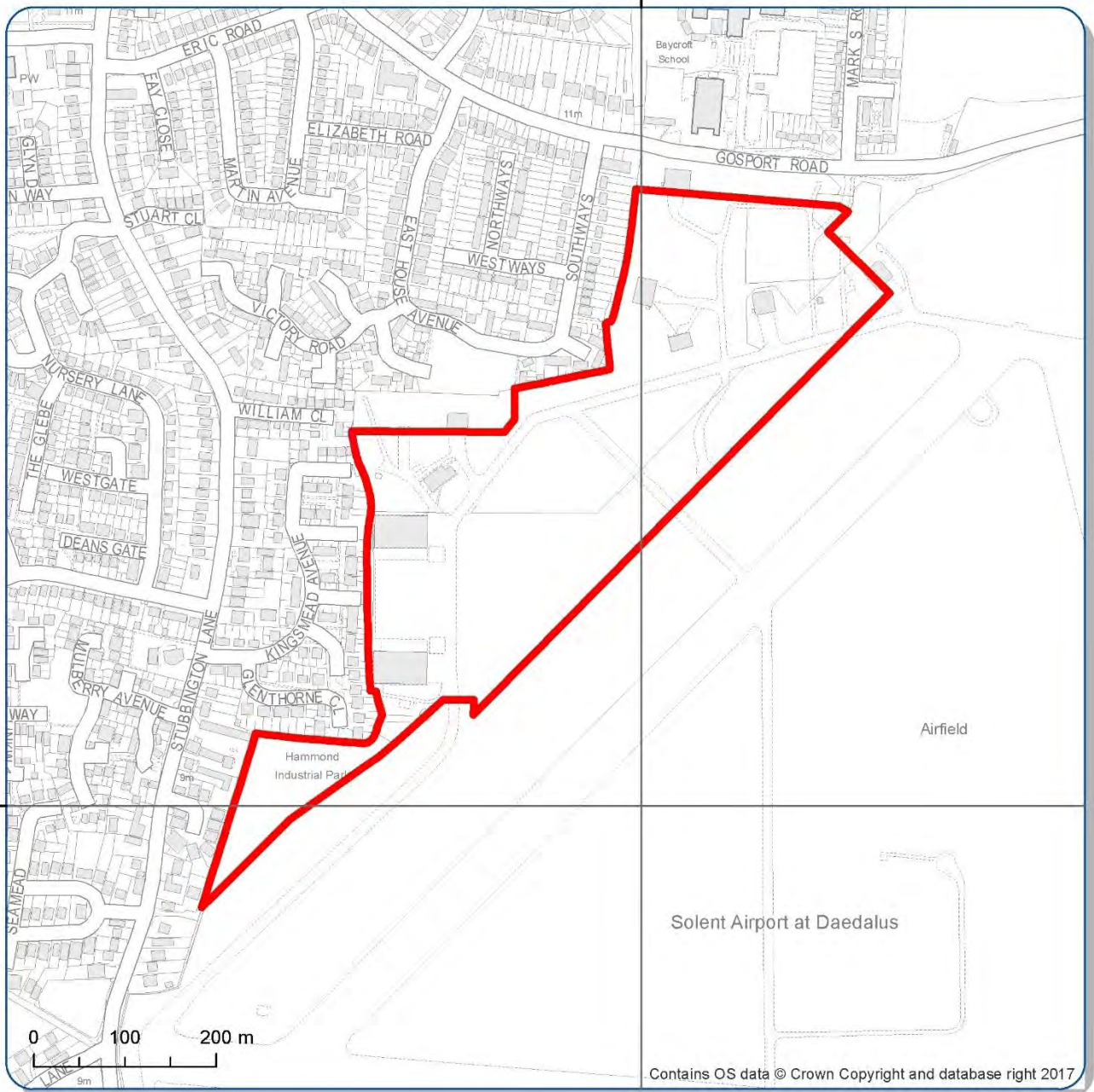
**SWORDFISH BUSINESS PARK,
DAEDALUS WEST**



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FAREHAM
BOROUGH COUNCIL

SITE ID 3125

**LAND AT SEGENSWORTH
ROUNDAABOUT**



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