

Employment Land Technical Paper (2024 Update)



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1. Introduction and Background

Purpose of this paper

- 1.1 Making sure that there is an enough land for new employment development, and that there is a strong possibility that this land will be developed is key to creating a firm foundation for economic growth and in planning for the borough over the years 2023-40. The main purpose of this technical paper is to explain how South Tyneside Council has devised its approach to the forward planning of employment development in the Publication Draft Local Plan 2023 - 2040.
- 1.2 This paper sets out the technical evidence we have used to assess how much employment floorspace may be required in the borough over the years 2023-2040¹ and where it should be located. This paper builds upon the Employment Land Review (2023), the Local Economic Assessment (2021).
- 1.3 This technical paper explains how the quantitative requirement for employment land set out in the Local Plan has been determined. The Local Plan also proposes to alter Green Belt boundaries to recognise the existing commercial operation at Wardley Colliery and allow for its limited expansion. This technical paper sets out the justification needing to identify additional employment land.
- 1.4 This paper should be read alongside the Stage 1 Green Belt Paper, which sets out why the Council considers that exceptional circumstances exist for amending the Green Belt boundary at Wardley Colliery.

How this paper has been updated from the previous version

- 1.5 The following updates have been made:
 - The section of the report that deals with the relationship between the Local Plan and the International Advanced Manufacturing Park (IAMP) has been updated. This is principally to acknowledge that South Tyneside Council and Sunderland City Council are preparing a new Area Action Plan (AAP) to replace the current IAMP AAP.
 - Employment land supply calculations have been updated to reflect the reduction in size of Tyne Dock Enterprise Park South (Dock infill) in response to the Level 2 Strategic Flood Risk Assessment.

Evidence base

- 1.6 There are two primary evidence reports which support the Plan:
 - Employment Land Review (2023)
 - Local Economic Assessment (2021)

¹ The principal evidential document is the Employment Land Review (ELR). At the time of its preparation the scheduled period for the Local Plan to cover was 2021 to 2039 and the forecasting scenarios were prepared with this end date. The scheduled period for the Local Plan is now 2023 to 2040. The Council has therefore updated the scenarios to cover the period 2023 to 2040.

Employment Land Review

- 1.7 Lichfields and Lambert Smith Hampton were appointed in to undertake an Employment Land Review (ELR) to provide South Tyneside Council with an understanding of:
- The borough's current position with respect to employment land supply (in both qualitative and quantitative terms); and
 - The future need for employment land in South Tyneside over the period 2021 to 2039, drawing upon a range of forecasting techniques.
- 1.8 The ELR draws on a range of sources and the following methods of consultation:
- A stakeholder workshop;
 - Interviews via Teams with stakeholders and business groups;
 - Telephone interviews with locally active property market agents and major landowners.; and
 - A business survey undertaken as part of the work that informed the Local Economic Assessment.

Local Economic Assessment

- 1.9 In 2021 South Tyneside Council commissioned Hatch and Regeneris to undertake a Local Economic Assessment (LEA). The LEA 2021 has also informed the Plan.

Structure of this Paper

- 1.10 This paper is structured into the following sections.
- National policy context
 - South Tyneside context
 - Discussion of how much land are we planning for?
 - Appraisal of which scenario for forecasting employment needs the Plan should use and alternative options considered
 - Appraisal of the International Advanced Manufacturing Park
 - Overview of the ELR assessment of employment land supply
 - Discussion of the Council's response to the ELR assessment of employment land supply
 - Discussion of whether more land needs to be identified for employment land supply
 - Appraisal of why it is proposed to remove Wardley Colliery from the Green Belt and allocate it as general employment land
 - Summary and conclusions

2. National and sub-regional policy context

National Planning Policy Framework

- 2.1 The National Planning Policy Framework was updated in September 2023 and replaces its previous iteration updated in July 2021. The Framework states that ‘significant weight’ should be placed on the need to support economic growth and productivity, considering both local business needs and wider opportunities for development [para 81]. To help achieve economic growth, planning policies should [para 82]:
- Set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration;
 - Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
 - Seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and
 - Be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances.

Planning Practice Guidance

The PPG – Plan Making

- 2.2 The PPG has two sections in ‘Plan Making’ that are of relevance to this technical paper – ‘What are the steps in gathering evidence to plan for business?’ and ‘How can authorities use this evidence to plan for business?’

The PPG – Housing and Economic Needs Assessments

- 2.3 The PPG also has sections in ‘Housing and economic needs assessments’ which are of particular relevance to this paper including – ‘How can strategic policy making authorities prepare and maintain evidence about business needs?’; ‘How can market signals be used to forecast future need?’; ‘How can current market demand be analysed?’ and ‘How can the specific locational requirements of specialist or new sectors be addressed?’.

Sub-regional context

North East Local Enterprise Partnership (‘NELEP’) Strategic Economic Plan (2022)

- 2.4 The Strategic Economic Plan sets out a clear vision to increase the number of jobs in the North East by 100,000 between 2014 and 2024, with 70% of these being ‘better jobs’ (defined as managerial, professional, and technical roles). In order to achieve the vision, the Plan identifies five areas of strategic importance, where the assets and capabilities of the North East economy provide strong opportunities for growth. Of particular relevance to South Tyneside are:
- Advanced manufacturing; and
 - Energy.

3. South Tyneside Context

South Tyneside

- 3.1 South Tyneside is located to the south of the River Tyne and is bounded by the following local authority areas: to the south by Sunderland; to the west by Gateshead; and beyond the River Tyne to the north, by Newcastle upon Tyne and North Tyneside. The borough benefits from good public transport infrastructure, with 10 Metro stations and a network of bus routes providing frequent services connecting residents to destinations throughout Tyne & Wear.
- 3.2 Key road connections within South Tyneside include:
- The A19 – a key strategic route connecting the Tyne and Wear City Region to Northumberland in the north and Durham, Hartlepool, Tees Valley and North Yorkshire in the south;
 - A194(M) – running south west to north east connecting the A1(M) at Washington (Junction 65) to South Tyneside; and
 - A184 – running east to west connecting South Tyneside with Gateshead.
- 3.3 South Tyneside falls within the area covered by the North East Local Economic Partnership. An analysis of commuting patterns indicates that the borough is a net exporter of labour and falls within the wider travel to work areas of 'Newcastle and Durham' and 'Sunderland'. From a commercial market perspective, however, the borough's inter-relationships are strongest within Sunderland and Gateshead – particularly in the Washington, Follingsby, Monkton, Boldon area.
- 3.4 South Tyneside contains the lowest level of employment stock of any of the Tyne & Wear authorities. Provision is dominated by industrial space. The industrial nature of the local economy is also clear from an assessment of South Tyneside's role within the Tyne & Wear context. Office floorspace comprises 5% of office floorspace in Tyne & Wear.
- 3.5 The northern part of South Tyneside is densely developed, and the built-up area extends to the coast. This contrasts with the southern part of the borough where Boldon, Cleadon and Whitburn are separated from the conurbation – and each other – by farmland. Employment premises have traditionally been concentrated in the northern part, within a wide band of estates along the River Tyne, although recent development activity (as measured by gross take-up rates) has been stronger on the western side of the local authority. The northern industrial estates typically accommodate a range of premises including factories, workshops, warehouses, and offices. Around the Port of Tyne there is a greater concentration of offices, whereas around the Simonside, Bede and Middlefield industrial estates the concentration of factories and workshops is higher. Offices are distributed across the borough, but with a noticeable cluster around South Shields town centre.

Constraints of employment land

- 3.6 The borough's portfolio of employment land has traditionally been concentrated within the northern part of the borough. However, this area is not as well penetrated by the highway road network as the western part of the borough and opportunities within it for expansion are

limited to when a parcel of land becomes available within an industrial estate. The exception to this is the former Dow Chemicals site which is available, but which requires significant investment. The open areas within the western part of the borough are predominantly designated as Green Belt.

- 3.7 The Tyne and Wear Green Belt extends from Gateshead and Sunderland to the south of the Borough. It covers 2,231 ha, 33% of the borough's area. Whilst this provides an important environmental resource for the borough, it also imposes a constraint on the supply of employment land. The test of 'exceptional circumstances' has to be met for the plan-led release of land from the Green Belt for what is termed 'inappropriate development'.
- 3.8 The Local Economic Assessment (LEA) (2021) notes that commercial agents have reported that access to the A19 is a key requirement for manufacturing and distribution businesses, but northern and eastern parts of the borough are seen as inaccessible. Business Parks in the south and west of the borough are experiencing the highest demand, particularly Monkton Business Park and Boldon Business Park. The LEA states that there is an undersupply of both office and industrial premises which is acting as a barrier to growth for many businesses (particularly manufacturing firms).

4. How Much Employment Land Are We Planning For?

Types of employment land

- 4.1 For the purposes of assessing the supply of employment land, the 2023 ELR separates employment land into two categories:
- General employment land - land suitable for general non-specialist employment uses.
 - Port and river related employment land - sites along the river corridor that are well situated to provide services to the offshore energy sector including renewables as well as the manufacture of wind turbine generators.

Future Requirements for Employment Space from ELR

- 4.2 For the purposes of assessing the need for employment land, port and river related employment land has been assimilated under general employment land. This is because it is considered that an overall figure for employment land need is more reflective of the overall employment land situation whilst maintaining the separation for the purposes of supply allows an understanding of the contribution being made to the supply from each of the two categories respectively.
- 4.3 At the time the 2023 ELR was prepared, the National Planning Practice Guidance stated that 'local authorities should develop an idea of future needs based on a range of data which is current and robust' and recommended that authorities 'make use of forecasts and surveys to assess requirements'. The ELR used employment growth forecasts for South Tyneside covering 2021 to 2039 (to align with the Council's Local Plan period at that time). The Council has updated these forecasts to align with the period now covered by the Local Plan (2023-2040) and these are reflected in this paper.
- 4.4 The 2023 ELR used 5 forecasting scenarios to provide a range of estimates for the future need for employment space in the borough. Each scenario has a variety of advantages and disadvantages. The study considered the following scenarios:
- **Scenario 1: baseline projections of employment growth** (labour demand) within the main office and industrial sectors derived from a pre-Covid baseline economic forecast produced by Experian (March 2019)
 - **Scenario 2: baseline projections of employment growth** (labour demand) within the main office and industrial sectors derived from the latest baseline economic forecast produced by Experian (March 2022)
 - **Scenario 3: a policy-on estimate of employment growth** (labour demand). This builds on the Experian work but differs from it as the Experian work is a point in time assessment that does not factor in future anticipated growth from policy interventions of which the major example is IAMP. It therefore seeks to reflect the anticipated wider impact of the IAMP proposals

- **Scenario 4: estimates of local labour supply growth based on housing growth** based on demographic assumptions applied to the Standard Method local housing need figure that was applied to the Draft (Regulation 18) Local Plan 2021-2039 (321 dwellings per year)
- **Scenario 5: consideration of past (net) take-up rates of employment space** based on analysis by Lambert Smith Hampton

How much General Employment Land is required?

4.5 Table 1 shows the net total land requirements for each scenario. General employment needs range from 3.18 ha (Baseline Labour Demand – Pre-Covid) to 25.79 ha (policy-on labour demand). The top end of the range is underpinned by a policy-on labour demand scenario that seeks to capture the potential impact of IAMP on the general employment land market.

Table 1: Total (net) employment land requirements by scenario (2021-2039) (hectares)

Type of Space/Use Class	Baseline Labour Demand (Pre-Covid)	Baseline Labour Demand (latest data)	Policy-On Labour Demand	309 dwellings per annum (Standard Method)	Past (net) completions
Total	3.37	11.29	27.31	19.50	19.92

4.6 To estimate the overall employment land requirement that should be planned for when allocating sites, it is common practice to add an allowance – to the net land requirements – as a safety margin. The ELR recommends that a two-year safety margin is added.

4.7 The ELR recommends ‘the Council plans to meet future needs of between 25 hectares and 35 hectares.’ It adds ‘It should be noted, however, that this range makes no allowance for loss replacement or churn. Whether to apply either of these allowances is viewed as being a policy decision to be taken by South Tyneside Council.’

4.8 The Council considers that a robust employment land requirement requires the addition of a safety margin and an allowance for losses. Table 2 shows the requirements by scenario with these adjustments made.

Table 2: Indicative gross land requirement by scenario for General Employment Needs (including safety margin and replacement of losses) (Ha) (2021-2039)

Type of Space/Use Class	Baseline Labour Demand (Pre-Covid)	Baseline Labour Demand (latest data)	Policy-On Labour Demand	309 dwellings per annum (Standard Method)	Past (net) completions
Land Required (net) 2021-2039	3.37	11.29	27.31	19.50	19.92
Indicative Gross Land Requirements by Scenario (safety margin only) (ha) –	9.65	17.57	33.59	25.78	26.20

Indicative Gross Land Requirement by Scenario (safety margin and replacement of losses)	20.22	28.14	44.16	36.35	36.77
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- 4.9 The ELR assessed need over the period 2021-2039. The Plan now covers the period 2023-2040. The Council has adjusted the requirements for each scenario accordingly (see Appendix 1). Table 3 shows the adjusted requirements.

Table 3: General Employment Requirements adjusted for 2023-2040 with safety margin and replacement of losses allowance added

Type of Space/Use Class	Baseline Labour Demand (Pre-Covid)	Baseline Labour Demand (latest data)	Policy-On Labour Demand	309 dwellings per annum (Standard Method)	Past (net) completions
Land Required (net) 2023-2040	3.18	10.66	25.79	18.41	18.81
Indicative Gross Land Requirements by Scenario (safety margin only) (ha)	9.11	16.59	31.72	24.34	24.74
Indicative Gross Land Requirement by Scenario (safety margin and replacement of losses)	19.09	26.57	41.70	34.33	34.72

5. Which scenario should the Plan include?

- 5.1 The ELR recommends that the Baseline Labour Demand scenarios (Scenarios 1 and 2) are discounted on the basis that they risk failing to proactively encourage sustainable economic growth.
- 5.2 Scenario 3 (policy-on labour demand) identifies an employment need figure of almost 35 ha. The level of employment growth underpinning Scenario 3, which seeks to capture the impacts of IAMP on the general employment land market, is high in the context of past trends. The ELR advises that the IAMP proposals are expected to create significant employment opportunities in the wider supply chain. However, the ELR does caution that the ability to fully take advantage of these opportunities will depend on the *'ability to offer good quality employment sites, with good access to the strategic road network and in close proximity to the IAMP'*.
- 5.3 The Council has selected Scenario 3 for the Publication Draft (Regulation 19) Local Plan. An allowance has been added for a safety margin and replacement of losses which has increased the requirement to 41.70 ha (see Paras 4.6, 4.7 and 4.8 of this paper).
- 5.4 Scenario 4 (the Labour Supply Scenario based on housing growth) shows that the Council would need to allocate at least 25 ha of employment land to support housing growth. The ELR recommends that, in order to avoid increasing out-commuting from the borough, the Council should look to this level of need as a minimum.
- 5.5 The data for Scenario 5 (past take-up rates) has been assessed over 5, 10, 15 and 20 year periods in order to even out the consequences of fluctuations in economic conditions. The net requirement for this scenario is almost 20 ha. However, it is considered that whilst this provides a useful benchmark, it also has limitations as a forecasting tool because it does not measure take-up against the supply of available sites that are attractive to the market i.e. other evidence shows that in areas of high market demand, take up has been restricted by a lack of sites.

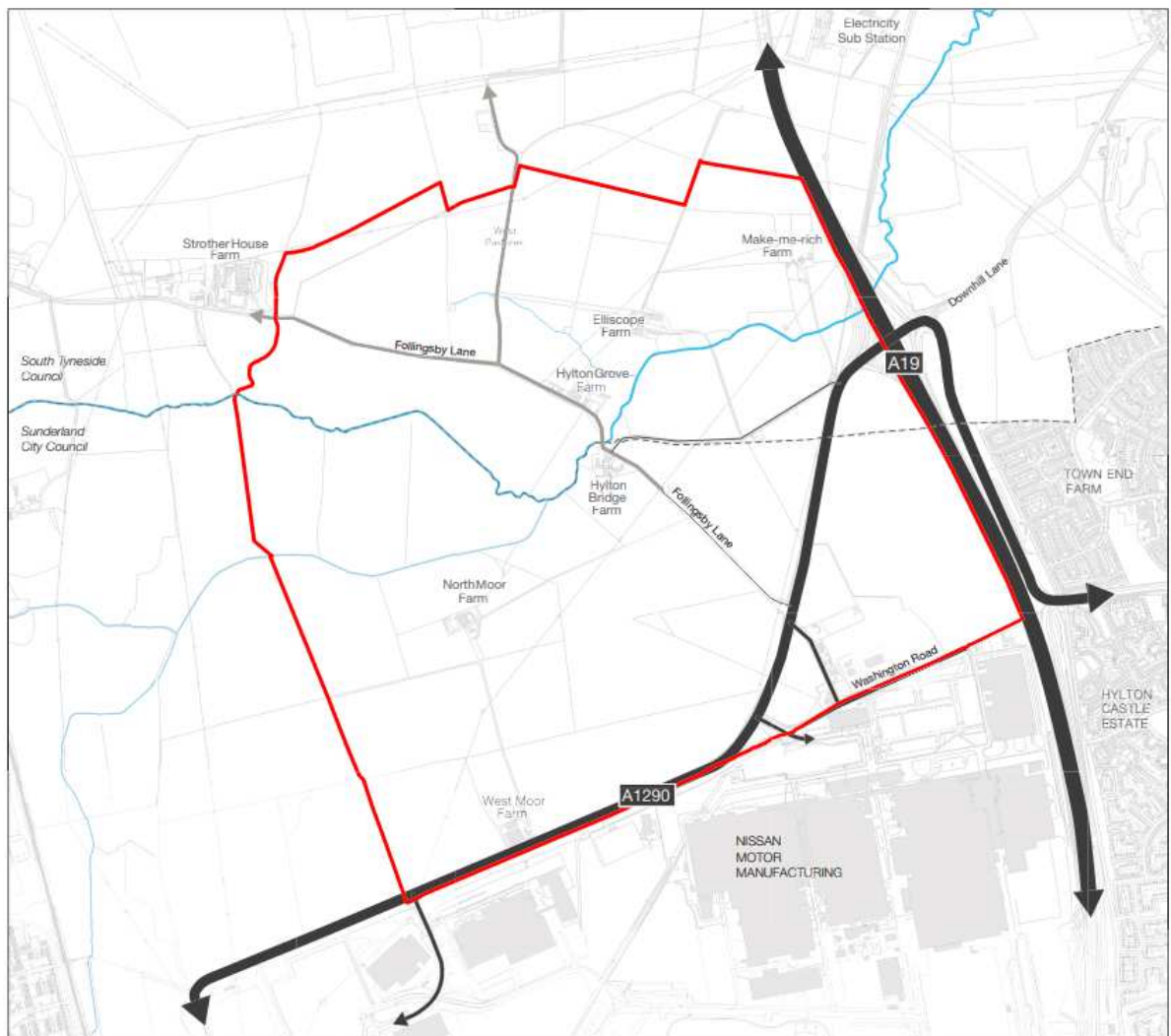
6. The International Advanced Manufacturing Park (IAMP)

- 6.1 The opportunities associated with IAMP underpins Scenario 3: policy-on labour demand. This section of the report provides context to the relationship between IAMP and Local Plan planning policy and delivery.

Background

- 6.2 The IAMP straddles the administrative boundaries of Sunderland and South Tyneside (Fig 1) and represents a unique opportunity for the automotive and advanced manufacturing sectors in the UK.

Figure 1: IAMP AAP Boundary



- 6.3 Located next to Nissan, the UK's largest and most productive car manufacturing plant, the IAMP provides a bespoke and world class environment for the automotive supply chain and related advanced manufacturers. Overall, the IAMP will help Sunderland, South Tyneside, the North East region, and the UK continue to thrive as one of the best international locations for

automotive and advanced manufacturing, building on Nissan's success as one of Europe's most productive car plants since it was established here more than 30 years ago.

Planning and Economic Policy Framework

The Area Action Plan (AAP)

- 6.4 In order to support the delivery of the IAMP, Sunderland and South Tyneside Councils prepared an Area Action Plan for the site which would remove 150 hectares (ha) of land from the Green Belt and allocate it for development. Following an Examination in Public, both Councils formally adopted the IAMP AAP on 30 November 2017.
- 6.5 The adopted IAMP AAP (2017) allowed for employment growth of 7,850 jobs at the IAMP. It allocates 150 ha of development land to facilitate the delivery of up to 392,000sqm of employment floorspace for Principal and Supporting uses. Principal uses are defined as production, supply chain and distribution activities related to the Automotive and Advanced Manufacturing Sectors. A further 110 ha of adjacent land is set aside as an Ecological and Landscape Mitigation Area (known as the ELMA).
- 6.6 The IAMP AAP forms part of the adopted development plans for both Sunderland and South Tyneside Councils and sets the planning policy framework against which applications within the IAMP area are assessed.

IAMP Interim Position Statement

- 6.7 In December 2021, both Councils published the IAMP AAP Interim Position Statement (IPS) which had regard to the objectives of the IAMP AAP and its policies and included an update on the economic context and demand for floorspace at the IAMP. Following its adoption by both Councils, the Interim Position Statement has been used as a material planning consideration in the determination of planning applications until the IAMP AAP Review was undertaken.

IAMP AAP Review

- 6.8 A review was undertaken in 2022 to determine whether the policies of the AAP are effective, consistent with national policy and whether there are any other prevailing circumstances present which would warrant the policies being updated.
- 6.9 The review found that the policies have been broadly effective in achieving the overall vision and objectives of the AAP and have supported the delivery of early phases of development within the IAMP area.
- 6.10 The policies have also ensured that the necessary infrastructure has been delivered at the appropriate time to support the development undertaken to-date, including the completion of junction improvements at the A19/A1290 Downhill Lane junction, improvements to the local network on the A1290 and necessary utility provision to all of the occupied plots. Early phase works on the ELMA have also been completed as part of the IAMP Phase 1 development.
- 6.11 Whilst it is acknowledged that the AAP was prepared at a time when the development was proposed to be brought forward through a Development Consent Order (DCO) as part of its

designation as a Nationally Significant Infrastructure Project (NSIP), the policies have sufficient flexibility to allow development to take place through the normal Town and Country Planning Act (TCPA) consenting route. Therefore, despite the site no longer being classified as an NSIP and a DCO no longer being prepared as the proposed consenting mechanism, it is considered that the policies of the IAMP AAP still provide an appropriate basis on which to determine planning applications.

6.12 The review also considered that the policies of the IAMP AAP remain broadly consistent with the NPPF and supporting Planning Practice Guidance (PPG). Whilst there have been some notable changes to national policy since the plan was adopted, such as the introduction of biodiversity net gain, it is not considered that these changes would warrant an update to the policies of the plan, as these matters can be dealt with adequately through the decision-making process having regard to national policy requirements and legislation.

6.13 Regard has been given to the IAMP AAP Interim Planning Statement and it is considered that the IAMP AAP remains an appropriate policy tool to support emerging proposals on the site.

Delivery of IAMP to date and available land

6.14 Since the adoption of the IAMP AAP, significant development has already taken place – both in terms of physical infrastructure as well as construction and occupation of manufacturing units within IAMP ONE. These include:

- Testo's Junction (A19) improvement works by Highways England (now National Highways), completed in summer 2021.
- Downhill Lane improvement works on the A19 (National Highways) completed in summer 2022.
- The internal spine road (known as International Drive) has also been completed.
- The IAMP ONE ELMA has been created.
- Approval of over 156,000 sqm of floorspace by Sunderland City Council at IAMP ONE through two planning permissions (In May 2018 and June 2020). Three bespoke manufacturing buildings have been completed, two of which are occupied by Nissan's suppliers (SNOP and Faltec). The other unit was occupied temporarily by the Nightingale Hospital as part of the response to the Covid-19 pandemic.
- Planning permission was granted in October 2021 for Envision AESC UK Ltd.'s new Giga plant, producing batteries for electric cars for Nissan in IAMP ONE.
- Planning permission was granted in August 2023, to deliver demolition/early infrastructure works and up to 168,000sq.m of gross internal floorspace at Land North/East and South of International Drive. The application site abuts the approved and implemented IAMP ONE site. This was a cross-boundary application, but the majority of the application site falls within the administrative area of South Tyneside.

Figure 2: New Buildings and Access Road at IAMP ONE



Source: HBD

- 6.15 Progress towards the delivery of the IAMP is documented in the International Advanced Manufacturing Park Annual Monitoring Report 2023-2024 published jointly by South Tyneside and Sunderland Councils.

Changes since the adoption of IAMP AAP

- 6.16 Since the adoption of the IAMP AAP (2017), the market context has changed due to a combination of macroeconomic shocks and developments specific to the automotive industry, including the electrification of the automotive industry, European Union exit and the Covid-19 pandemic.
- 6.17 The UK Government's commitment to achieving 'net zero' by 2050 and the ambitious target for phasing out internal combustion engine (ICE) vehicles by 2035 is driving forward the need to decarbonise cars and vans and to electrify the automotive industry. This will create opportunities to grow existing businesses and attract new ones to meet the needs of the changing technology, including the need to manufacture hybrid vehicles and EVs. There is a need to focus on the development of battery production facilities. Furthermore, considering Covid-19, it has been recognised that there is an urgent need to create greater resilience and flexibility in supply chains moving forward.

The North East Investment Zone

- 6.18 The North East Devolution Deal (2022) identified land at the IAMP as falling within the North East Investment Zone. The North East Investment Zone is a ten-year programme which aims to unlock growth in the clean energy and green manufacturing sectors, with a particular focus on:
- Electric vehicle and battery manufacturing
 - Office and renewable energy; and
 - Associated low carbon manufacturing, materials and research.
- 6.19 The IAMP is one of four sites which will make up the North East Investment Zone (Blyth Energy Central, the River Tyne Economic Corridor, the IAMP and NETPark in County Durham). It is anticipated that this recent designation has the potential to increase the attractiveness of the IAMP to prospective occupiers.

The International Advanced Manufacturing Park: Employment Land Position Statement (2024)

- 6.20 Sunderland City Council and South Tyneside Council commissioned a report to consider whether the current IAMP AAP area remains sufficient to meet anticipated development needs for the sectors being targeted by the IAMP and whether the scale of individual requirements and space utilisation rates observed at the IAMP align with those originally envisaged.
- 6.21 The study concluded that the IAMP is capable of supporting growth in employment as a result of:
- The opportunity associated with the automotive industry's shift to electrification;
 - Proximity to the UK's most productive car plant and its status as the location of the only EV battery gigafactory in Britain;
 - The economic importance of the advanced manufacturing and distribution sectors at the North East Local Enterprise Partnership (NELEP) level; and
 - The scale of occupier interest in land/premises at the IAMP.
- 6.22 The document identifies that an estimated up to 47.7ha of additional land could be required to accommodate 7,850 jobs.
- 6.23 The above factors have led to Sunderland City Council and South Tyneside Council taking steps to review the IAMP evidence base and the current IAMP AAP. It is considered necessary to update the AAP for a number of reasons, including the following:
- Ensuring the IAMP AAP allocates all of the International Advanced Manufacturing Strategic Site (IAMSS), which forms part of the North East Investment Zone.
 - To accommodate the business needs of the supply chains to service anticipated automotive construction requiring much larger floorplate units than was originally envisioned.
 - Improve the competitiveness of the Nissan plant, by bringing its supply chain within close proximity to the manufacturing plant, also assist in reducing carbon emissions associated with the transportation of components for the manufacturing process.
 - Evidence to justify expansion of the IAMP to support additional inward investment opportunities; and
 - Update the policies of the AAP to provide a more flexible approach consistent with that within each of the authorities' respective development plans.

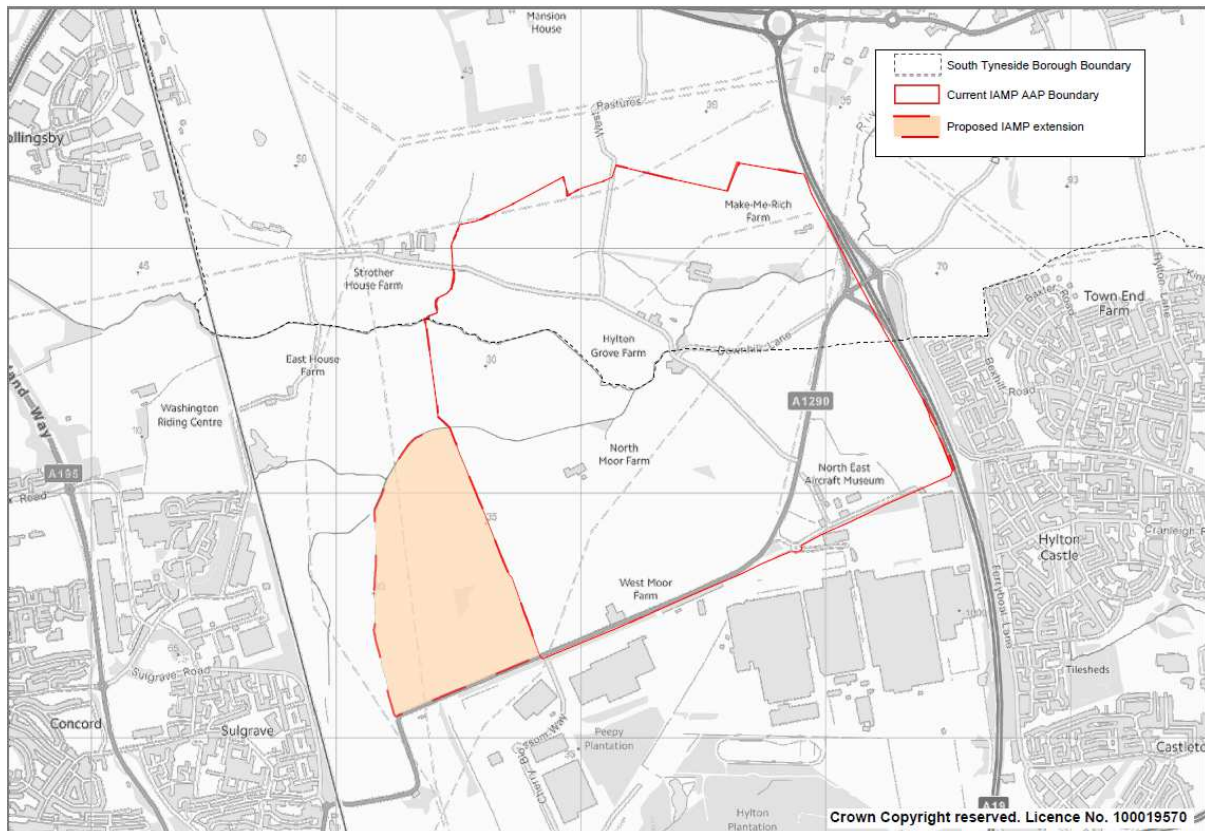
New IAMP AAP

- 6.24 South Tyneside Council and Sunderland City Council are preparing a new Area Action Plan (AAP) to replace the current International Advanced Manufacturing Park (IAMP) AAP. The proposed plan period covered by the AAP would be 2024-2042. A joint consultation on the Draft Regulation 18 AAP was undertaken between July - September 2024.

6.25 The Regulation 18 AAP establishes the first stage in the preparation of the new plan and proposes a number of changes including:

- Removing the upper floorspace limit of 392,000 square metres;
- Expanding the redline area of the AAP to include an area of safeguarded land to the west of the site (Fig 2) in order to meet anticipated development needs. This would include the allocation of an additional 75ha of development land;
- Broadening the principal uses permissible at IAMP and aligning these to the North East Investment Zone priority sectors;
- Ensuring that the policies are more flexible around supporting uses whilst retaining the overall focus on the development of principal uses;
- Providing more flexibility regarding the potential uses that could be located within the Hub;
- Removing references to the DCO as a delivery tool, as planning applications will no longer be consented through this process; and
- Designating areas of the AAP as being potentially suitable for wind energy development.

Figure 3: proposed IAMP Extension



The position of IAMP in relation to overall employment land need and supply

- 6.26 The ELR states “A separate Area Action Plan (AAP) has been adopted to provide the planning policy framework for the IAMP, with a detailed body of site-specific evidence compiled to support the AAP. A Development Consent Order² and AAP Policy restrict occupiers of IAMP to advanced manufacturing businesses. For this reason, LSH analysis (as presented in this ELR) distinguishes the IAMP from the demand and supply balance of general employment land in South Tyneside” (paragraph 6.19).
- 6.27 This is the approach that informed the identification of general employment land requirements in the Sunderland Core Strategy and Development Plan (2020), which were considered separately to those of the IAMP and were accepted by the independently appointed planning inspector during the Examination in Public. South Tyneside Council concurs with the approach of separating the supply of general employment land from the supply of employment land at the IAMP that was embodied within the Sunderland Core Strategy and Development Plan and which the South Tyneside ELR recommends for the borough. However, the council still considers that it is appropriate to reference the supply of employment land from IAMP as clearly there is a relationship between this and the supply of general employment land in the borough, as evidenced by the relocation of Faltec from Boldon Business Park to IAMP.
- 6.28 The next section of this paper details the ELR assessment of employment land in South Tyneside. This identified 51.25 ha of land available at IAMP (see Table 4). All of the land within South Tyneside now has planning permission, with the exception of the very small area of land which is an operational farm and not available for development.
- 6.29 As set out in their joint Statement of Common Ground, both Sunderland City Council and South Tyneside Council recognise that there is a relationship between the supply of employment land at IAMP and the overall supply of employment land in their respective boroughs. However, both the original IAMP AAP and the new IAMP AAP draw a clear distinction between the supply of general employment land identified in borough-wide development plan documents and the particular principal uses to which IAMP is restricted. Whilst the new IAMP does expand these slightly in order to align with the uses supported by the North East Investment Zone status, these use (referred to as “the Principal Uses”) in the new AAP, remain restricted. South Tyneside Council considers that, whilst the IAMP is clearly an important asset to both of the councils whose administrative areas it straddles, the IAMP is properly understood as being primarily a regional economic asset providing the region with a supply of land for the specialist uses designated as “the Principal Uses”.
- 6.30 Therefore, the land required for the IAMP is not included in the Sunderland Core Strategy and Development Plan as it is being brought forward separately through the IAMP AAP. The South

² The consenting mechanism for development on the IAMP will no longer be through a Development Consent Order as the site is no longer designated as a Nationally Significant Infrastructure Project (NSIP).

Tyneside ELR recommended alignment with this approach and the council has accepted this recommendation. However, as set out in Section 4 of this Paper, the ELR has considered the potential impacts of the IAMP when considering future need. The IAMP is very important for both South Tyneside and Sunderland Councils and there is a clear economic rationale for reflecting this in the forecast employment space requirements.

7. The ELR assessment of the supply of employment land in South Tyneside

7.1 The ELR includes analysis from Lambert Smith Hampton (LSH) of employment sites in the borough. Through inspections of all employment areas and those other areas identified by the Council, LSH assessed individual employment sites according to a range of market and sustainability criteria and have identified a handful of additional sites. LSH also noted where sites have been reoccupied for employment purposes and are therefore no longer available. In accordance with Planning Practice Guidance, LSH has excluded from this assessment, sites of less than 0.25 ha and unoccupied storage compounds as these are more likely to be reoccupied as compounds than developed for employment use. The assessment of available land includes:

- a. Vacant sites currently allocated for employment use
- b. Vacant sites formerly in employment use
- c. Vacant land in areas identified by the Council for mixed-use development and which could include an employment component
- d. Expansion land held by businesses
- e. Employment premises that are at, or nearing, functional obsolescence
Land and buildings in alternative uses that may have potential for economic development.

7.2 In considering the supply of and demand for employment land within South Tyneside, LSH used a staged approach:

1. Consider the amount of land currently available for employment development (categories a, b & c above) and compare this against past take-up rates to arrive at a notional number of years supply within the borough. This allows an assessment as to whether current allocations and other available employment land is sufficient for the Plan period
2. Consider the market attractiveness of these sites using an analysis of the location of past take-up to understand if they should be retained within the supply
3. Consider whether growth sectors are likely to increase demand for specialist sites
4. Consider whether sites are readily available or require preparation and thus their ability to meet demand in the short term
5. Identify the impact that vacant office and industrial buildings have on the market for development sites, within the context of economic and property development cycles
6. Identify the prospects for supply to be supplemented by releases of expansion land.

Stage One: The number of years supply of available employment land

7.3 22 sites were identified as available, providing an estimated net developable area of 101.32 hectares. This includes IAMP which is not part of the stock of general employment land.

Table 4: Available employment sites

Site	Location	Estimated net area (ha)
General Employment Land		
Ashworth Frazer Industrial Estate, Hebburn	Hebburn	2.30
Former Hawthorn Leslie Shipyard, Ellison Street	Jarrow Riverside	3.70
Land at Wagonway Industrial Estate, Hebburn	Jarrow Riverside	0.42
Green Business Park, Hebburn/Jarrow Staithes	Jarrow Riverside	1.71
Former Dow Chemicals, Ellison Street/Chaytor Street	Jarrow Riverside	12.15
East of Pilgrims Way, Bede Ind Est	Simonside / Bede	0.43
West of Pilgrims Way, Bede Ind Est	Simonside / Bede	1.41
Land at Towers Place, Shaftesbury Avenue, Simonside Ind Est	Simonside / Bede	1.36
South of Heddon Way, Middlefields Ind Est	Simonside / Bede	0.61
West of 16 Brooklands Way, Boldon Business Park	Boldon	0.60
General Employment Land Total		24.69
Specialist Employment Land – Port/River Access		
Tyne Dock Enterprise Park South (Dock Infill)	Port of Tyne	3.50
Compound beside Jarrow Road	Port of Tyne	0.25
Hill 60	Port of Tyne	0.51
Former McNulty Offshore, Commercial Road	Port of Tyne	4.36
Tyne Dock Enterprise Park (SE)	Port of Tyne	0.58
East of wood pellet silos	Port of Tyne	1.90
Tyne Renewables Quay	Port of Tyne	9.95
North of Warehouse 21	Port of Tyne	1.77
Former MD Southern	Port of Tyne	2.56
Specialist Employment Land – Port/River Access Total		25.38
Specialist Employment Land – Advanced Manufacturing		
IAMP South (north of Nissan site)	IAMP	1.41
IAMP South (north west corner)	IAMP	7.34
IAMP North	IAMP	42.50
Specialist Employment Land – Advanced Manufacturing Total		51.25³
Overall Employment Land Total		101.32

³ As stated within Section 3 of this Paper, all of the land within South Tyneside now has planning permission, with the exception of the very small area of land which is an operational farm and is not available for development.

Mixed-Use areas

7.4 The ELR assessed some sites outside of industrial areas as being appropriate for mixed-use development, which could include employment uses (Table 5).

Table 5: The employment component of areas assessed by the ELR as having potential for mixed-use development.

Mixed-Use Area	Location	Gross Area (ha)
Argyle Street / Caledonian Street	Hebburn	6.80
Former Duncan House (cleared site)	South Shields	0.29
Harton Quay, South Shields	South Shields	0.50
Holborn Regeneration Area, Commercial Road	South Shields	1.72
Disused Gasholder, Oyston Street/Garden lane	South Shields	0.33
Central Library, Anderson Street	South Shields	0.32
Total		9.96

7.5 The Council has considered these areas and for the reasons set out at Appendix 2 of this paper, considers that the Holborn Regeneration Area is the only the deliverable employment component.

Overall take-up of Employment Land

7.6 The take up of employment land over the period 2017 to 2021 has averaged 2.26 ha per annum which is significantly lower than the long-term average of 3.31 ha per annum over the period 2002-2021. Local agents are of the opinion that the decline in take-up reflects a limited choice of available sites. More than half of the take-up over both periods and all take up for specialist port and river-access related uses has been within the Port of Tyne estate.

Table 6: Past take-up of employment land in South Tyneside (2023 ELR)

Period	Take-up (ha)			
	General Land	Specialist Land (Port)	Total	Average (per annum)
Short-term: 2017-2021	7.13	4.15	11.28	2.26
Medium-term 2012-2021	12.0	15.17	27.17	2.72
Long-term 2007-2021	18.03	17.50	35.53	2.37
Very long-term 2002-2021	40.43	25.69	66.12	3.1

Take-up of Employment Land and the wider economy

7.7 There was relatively strong take up at the start of the period peaking in 2006 and reflecting a period of strong economic growth. In 2008 the UK went into a recession with no take-up for two years, followed by a weak recovery until 2016 when there was strong take up at the Port of Tyne (Nissan took up 3.53 ha for extension of its car terminal and the construction of wood pellet silos took a further 2.72 ha). The impact of Covid-19 resulted in no take-up in 2020.

The Spatial Distribution of the take up of Employment land

7.8 Over the very long term (2002-2021) the Port of Tyne has accounted for 38% of all take-ups and all of the specialist port/river access use. Boldon Business Park accounted for 4.72 ha and Monkton Business Park for 12.61 ha of general employment land take-up. This reflects the success of these two modern and well-located business parks.

Implied supply

7.9 Table 7 shows land currently available for development at the average take up over the period 2002-2021 (3.31 ha). This implies, in purely quantitative terms (i.e. making no assessment for market attractiveness), an overall supply of 14 years for both general employment land and specialist port/river access land. LSH advise that in order for the average take-up to return to more than 3 ha per annum there needs to be:

- Steady economic growth in the wider economy and a supply of serviced plots on modern industrial estates; and
- A recognition that viable speculative development of employment premises in the region is dependent on public sector financial support

Table 7: Employment land supply and demand in South Tyneside (2023 ELR)

	Available (ha)	Annual take-up (ha)	Implied supply (years)
General employment land	24.69	2.02	12
Specialist employment land – port/river access	25.38	1.28	19
Total employment land	53.41	3.31	14

Stage 2: The Market Attractiveness of Available Employment Land

7.10 LSH identified six principal sub-areas which accommodate most employment land take-up and assessed the supply of land and market demand for each sub area.⁴ This analysis of past take-up suggests an imbalance between the location of available land and market demand as expressed by take-up over the period 2002-2021.

7.11 Supply exceeds demand in Hebburn/Jarrow and is comprised entirely of the former Dow Chemical works site (12.7 ha). The ELR advises that although this site is technically available it is not a realistic option for development at the present time. This is because owners have rejected offers to purchase parts. The ELR also states that, whilst the site has potential for a

⁴ The identified sub areas are Hebburn/Jarrow, Simonside/Bede/Middlefields, South Shields Riverside and Town Centre (mixed-use), Boldon/Cleadon, Monkton/Wardley, Specialist Employment Land - Port.

wide range of offshore uses, there would be high abnormal costs to remediate and remove foundations.

- 7.12 The ELR identifies a demand 'hotspot' in the southwest of the borough, where businesses would be able to take advantage of the good connections to the strategic road network. There are two existing business parks in this part of the borough (Monkton and Boldon) and both are very successful with very high levels of occupancy but consequently also very limited capacity for new businesses.
- 7.13 The existing supply is predominantly in the north of the borough. The supply of sites is tight and includes sites that are poor quality and would require considerable investment to make them attractive to occupiers.
- 7.14 This concurs with the experience of the STC Business Investment Team which is that they are struggling to respond positively to queries from existing businesses in the borough that are looking for new premises to expand. Consequently, some businesses have relocated outside of the borough and there are indications that this trend may continue.

Stage 3: Demand for Sites with River access over the Plan period

- 7.15 The ELR draws on research commissioned by the North East Combined Authority to consider the land and premises requirements of the offshore energy sector in respect of each of four stages – development, equipment manufacture, installation, and operation. The assessment recognised opportunities for South Tyneside but also cautioned as to the level of competition regionally between sites.
- 7.16 Port of Tyne has advised that following several years of enquiries, businesses are now ready to commit to sites. Equinor have taken a 35-year lease at Tyne Dock Enterprise Park, where they are constructing an Operations and Maintenance base to serve the Dogger Bank windfarms. The strategy of the Port has changed from expansion of its estate, to investing in those sites with access to deep water quays and which are best placed to compete for businesses serving this rapidly growing sector. The filling of Tyne Dock and the purchase of the McNulty yard have provided the Port with additional riverfront land which is being prepared for development. This is now being complimented by investment in the former coal terminal to create the Tyne Renewables Quay.
- 7.17 In response to the opportunities in the offshore energy sector, South Tyneside Council commissioned WSP to assess the opportunities and constraints of four sites on the Tyne: Hawthorne Leslie, Jarrow Green Business Park, the former Dow Chemicals site and the CEMEX Jarrow Aggregates site. None of the four sites was regarded as suitable for any of the offshore energy opportunities. Each would require intervention and investment. Uses that would complement existing activity such as on the A&P Tyne yard (a marine engineering company situated adjacent to Hawthorne Leslie), were viewed as being preferable. WSP estimated the cost of required interventions as ranging from £5.6 million to £24 million depending on the end use. Former Dow Chemicals site and CEMEX Jarrow Aggregates Wharf were assessed as having broader potential with interventions. However, the CEMEX company has requested that the CEMEX Jarrow Aggregates Wharf is safeguarded to allow for the continuous transfer and movement of marine aggregates. Since the WSP report, planning permission has been

granted for residential development on the Hawthorne Leslie site and part of Jarrow Green Business Park has been developed for the Viking Energy Park.

- 7.18 In summary, although the Tyne is no longer the magnet for maritime economic activity that it once represented, marine and offshore industry is still clustered on both banks of the river. In South Tyneside, operational sites such as A&P Tyne, CEMEX and Tyne Enterprise Dock are interspersed with sites that are no longer operational, such as the Dow Chemicals, Hawthorn Leslie and Jarrow Green 'Business Park'. The ELR states *'There is an argument that such funding should be directed to sites with a broad demand profile'* which supports the allocation of the former Dow Chemicals site. The importance of the role of the Port of Tyne was recognised by stakeholders at the ELR workshop who identified it as *'a key asset for the borough in exploiting future growth in the offshore wind/renewable energy sector (including operations and maintenance opportunities).'*

Stage 4: Readily Available Employment Sites

- 7.19 Readily available employment sites are those that are immediately available, i.e. could come forward in locations that are attractive to the market and do not require substantial expenditure on site assembly, clearance, remediation, or infrastructure provision before development can take place.
- 7.20 General employment sites that meet these criteria are listed in Table 8 and total 3.05 hectares. When measured against take-up of 2.26 hectares per annum, these readily available employment sites represent one years' supply.

Table 8: Readily Available General Employment Land (ELR)

Site	Net Site Area (ha)
West of Pilgrims Way, Bede Industrial Estate	1.41
East of Pilgrims Way, Bede Industrial Estate	0.43
Middlefields Industrial Estate, South Shields	0.61
West of 16 Brooklands Way, Boldon Business Park	0.60
Total	3.05

- 7.21 LSH recommends that Local Plan allocations provide choice by maintain a five-year reservoir of readily available employment land though programmed investment in site preparation and infrastructure provision. However LSH acknowledges that some sites require substantial investment and therefore recommends that the Council consider an alternative strategy – new allocations in stronger market areas.

Stage 5: The Impact of Vacant premises on the Market for Employment Land

- 7.22 LSH advise that vacancy rates of 5% to 10% of stock would generally be sufficient to allow the 'churn' that is needed for a well-functioning commercial property market. The vacancy rate has fallen to 3.8% as a result of strong market demand over the past few years but there is little development coming forward owing to the lack of viability headroom for private sector speculative development.

Stage 6: Expansion Land

7.23 Some business have land adjoining their premises which is currently unused. If this land becomes surplus to requirements, then it could become available to the market. Overall levels of such land in South Tyneside are relatively modest. It is unlikely therefore to have a significant impact on the market if released.

The ELR summary of the supply of employment land in South Tyneside

7.24 The following is a summary of the findings from the assessment of employment land from the ELR:

- Measured against take-up, South Tyneside has general employment land equivalent to 12 years' supply. However much of this is not immediately available or is situated in areas where market demand is strongest.
- The stock of immediately available employment is equivalent to only one years' supply.
- There is particularly strong demand for employment land in the south west of the borough in locations with good access to the strategic road network.
- The sub-regional market for sites that can accommodate large manufacturing uses is largely met by the IAMP. However, the focus of the IAMP is on advanced manufacturing uses which means that it is unlikely to meet the demand for warehousing and logistics premises, nor will it cater for the demand for small industrial premises.
- A priority for the Council should be to identify new allocations on the southern edge of the conurbation. The allocation of additional land in areas of market demand will, by itself, be insufficient to stimulate industrial development activity. Developers will require serviced plots as well as gap funding.
- The Green Belt, which is tightly drawn around South Tyneside's urban areas, is a further constraint to development.
- LSH recommends that the former Wardley Colliery site in the Green Belt is given further consideration for allocation on the basis that it is a well-screened, brownfield site.
- The Port of Tyne has an implied supply of 16 years. The Port has a proactive approach to site preparation and infrastructure provision.
- The IAMP will provide employment land restricted to occupation by advanced manufacturing business.
- Demand for IAMP ONE (predominantly located within the Sunderland City Council area) has been strong and initial take-up rates high. IAMP TWO is located within South Tyneside and is not expected to be serviced until development of IAMP ONE is well progressed.
- The take-up of land for office development is constrained by low rents which undermine viability. High vacancy rates are identified amongst modern offices at Viking Industrial Park. Large offices developed in the Enterprise Zones are standing vacant. Small, serviced offices also have low levels of occupancy.

- Over the early years of the Plan period, LSH anticipate that take-up of land for office development will not be strong. Vacancy rates are lowest amongst smaller size bands, notably amongst units of 50-100 sq.m. LSH advise that the Council should consider opportunities for meeting this demand through identifying sites in locations where supply is tightest.

8. The Council's response to the ELR site assessment

8.1 This section of the report sets out how the Council has assessed employment and potential employment sites. Appendix 2 of this paper sets out the full assessment, it should be read in conjunction with the Site Selection Topic Paper. The Council's assessment has drawn on the following sources:

- The ELR assessment of employment land supply. This is the principal evidential source.
- Site visits undertaken by STC Officers in 2021.
- Site specific and market intelligence provided by the Council's Business Investment team.

Alternative sites

8.2 In addition to the potential sites identified in the ELR, several other sites have been either suggested by site promoters or identified through the Council's resources. The assessment of these sites is at Appendix 4.

General employment land and port and river-related employment land

8.3 There are sites along the riverside that are in established operational use such as A&P Tyne. However, in terms of sites previously considered to be available, the Council considers that only the former Dow Chemicals site (discussed below) and the remaining plots at the Port of Tyne are deliverable. The Port of Tyne site is allocated in the Local Plan for port and river-related uses. However, the Council considers that it is important to retain flexibility with the former Dow Chemical site, despite its riverside location.

Sites recommended for deallocation in the ELR

8.4 The ELR recommended that consideration be given to deallocating Ashworth Frazer Industrial Estate, the former Hawthorne Leslie shipyard and Jarrow Green Business Park having assessed a perceived lack of commercial attractiveness combined with site specific constraints for each site. It also recommended the deallocation of Land East of Luke's Lane which now has planning consent for residential development. The Council has undertaken an assessment of these sites and have proposed to deallocate these sites in the Plan.

Ashworth Frazer Industrial Estate

8.5 The ELR states '*At Ashworth Frazer Industrial Estate the complex of old buildings is vacant and in very poor condition. Rental levels are insufficient to make refurbishment a viable option and buildings are unlikely to be reoccupied*' (paragraph 6.64). The recommendation at Appendix 2: Site Matrix of the ELR is as follows:

'Substantial costs to demolish buildings, most of which are at end of economic life. Redevelopment for employment uses would not be viable given location, anticipated values and high abnormal costs. Council to allocate for residential.'

- 8.6 The site has now been granted planning permission for residential use. The Council therefore considers that the site should no longer be protected as employment land and should revert to being 'white land'.

Former Hawthorn Leslie Shipyard

- 8.7 Strategically the site is well located for port and river-related employment use. However there has not been demonstrable commercial interest in the site and there are significant site-specific constraints including the ecological value of the site, the risk from flooding, the potential for contamination and the associated cost of remediation and the potential for conflict with residential amenity. The recommendation at Appendix 3: Site Matrix of the ELR is as follows:

'Substantial investment required to bring site back into use. Area of low market demand, good supply of riverside sites. Council to allocate for residential.'

- 8.8 The site has now been granted planning permission for residential use. The Council therefore considers that the site should no longer be protected as employment land and should revert to being 'white land'.

Jarrow Green Business Park

- 8.9 Historically the site has included residential houses, industrial use (colliery, chemical works, lead works, tip) and infrastructure (waggon ways, staithe, jetties, coal conveyors and travelling cranes). The northwest part of the site appears to have been reclaimed from the river in the past. The site is fully owned by South Tyneside Council, following One North East funded site acquisitions through to 2008 and was acquired with a view to leveraging in public investment to regenerate the area. The area was branded 'Jarrow Green Business Park' to positively reflect the Council's aspirations for the site. Some remediation, reclamation, and access works have been carried out but as the Employment Land Review states *'The site is highly contaminated and there is a steep bank from the road to the river. Considerable site preparation would be required even to enable external storage on the site'*.

- 8.10 The north east area of the site is considered to be undevelopable as it consists of river edge slopes with a steep incline and a former landfill site, part of this area is also covered in trees. Jarrow Staithes are situated to the north of the site in the River Tyne and are jointly owned by the Council and the Church Commissioners. Direct access to the structure has been cut off to prevent trespass and vandalism. The Staithes would require investment if they were to be brought back into use. The recommendation at Appendix 3: Site Matrix of the ELR is as follows:

'Given the complexity and cost of bringing forward this site for employment use the site is not regarded as deliverable. The Council should consider showing it as "white land" in the Local Plan. Future use is realistically limited to enabling a modest extension of the warehousing and storage use to the west or use ancillary to the Viking Energy Centre. Not deliverable.'

- 8.11 To summarise the area consists of a mixture of land that is not developable and land that may not be available for employment development. The name 'Jarrow Green Business Park' is

therefore not considered to reflect the reality of this area and it is considered that it should revert to being 'white land' i.e., land without a specific Plan designation.

Land East of Lukes Lane, Monkton Fell (West) Hebburn

8.12 The ELR commented at Appendix 3: Final site assessment matrix, 'Grazing land. Knight Frank had marketed this and the adjoining site P1 for industrial use since March 2015. Site requires access and infrastructure provision so whilst in an area where demand relatively strong, viability of development weak.'

8.13 The ELR recommendation is: 'Council has granted planning consent for housing, thus site no longer available for employment purposes. Not available'.

8.14 The site has not been allocated for employment as it is now a residential commitment.

Table 9: Sites less than 1.0 ha recommended not be allocated in the ELR

ELR ref	Site name	Size	ELR recommendation	STC Officer response
E1	Land at Wagonway Industrial Estate, Hebburn	0.5	A suitable site on an established industrial estate which has attracted interest from businesses; but as the owner is unwilling to sell or develop, the site is not available.	The plot is not currently available and therefore has not been identified as part of the available employment supply. However, it is part of a well-established and successful industrial estate. The Council therefore considers that it would be incongruous to identify it as white land as the intentions of the owner may change and it is included in the Wagonway Industrial Estate allocation.
E27	West of Bedesway / Jarrow Road junction, Bede Ind Est	0.17	Smaller than threshold site area of 0.25 ha. Council should consider as potential windfall site within an established employment area. We do not recommend that the site is allocated for employment.	Retain allocation as within an established industrial area but do not include in calculation of available employment land.
E28	East of Feller UK, Middlefields Ind Est	0.29	We do not recommend that the site is identified as an available employment site	Retain allocation as within an established industrial area but do not include in calculation of available employment land.

The former Dow Chemicals site

- 8.15 The Plan includes the former Dow Chemical works site (12.15 ha). The site, which is located on the Jarrow Riverside, has had various industrial uses over the years, including shipyards, metal works (iron, copper, and silver), chemical works, gas works, engine works, pottery and saw mill. Industrial related infrastructure has included a dry dock, staithes, slipways, cranes, trackways, and tanks. The ELR states:

‘This is a riverside works that closed in 2015. LSH understand that the site is highly contaminated as a result of former chemical and shipyard uses. Whilst the site has largely been cleared of buildings, foundations and floor slabs remain in situ, ensuring that the abnormal costs of redevelopment would be substantial’ (paragraph 8.20)

‘Although the former Dow Chemicals site is ostensibly on the market, LSH advise that the owners have rejected offers to purchase parts and agents have consequently questioned whether the owners are committed to selling. Although technically available, therefore, the site is not a realistic option for development at the current time and LSH strongly recommend that the Council works with Dow Chemicals to identify redevelopment options for this major brownfield site’ (paragraph 8.21).

- 8.16 Regarding the potential of the site for port and riverside-related use the ELR comments as follows:

‘Through the government’s Offshore Wind Sector Deal there is now a commitment to funding investment in infrastructure to maximise the impact of regional clusters. There is an argument that such funding should be directed to sites with a broad demand profile. With investment, the Dow Chemicals site could attract businesses in the marine and offshore sectors. LSH understands that enquiries continue to be received by the site’s owners and with deadlines approaching to satisfy premises requirements to meet contracts, it seems premature to release this site for alternative uses. In recognition of this, LSH recommends that the Dow Chemicals site is retained for employment, to include – but not be limited to – marine or offshore uses’ (paragraph 6.52).

- 8.17 The site will require significant remediation and infrastructure provision. However, supporting the delivery of this site is a priority for the Council. It is therefore proposed to allocate it as land for general economic development. Although the Council would particularly welcome port and river-related uses on the site such as sub-sea services for the offshore wind sector, it is considered essential from a deliverability perspective to retain flexibility. The allocation is therefore for general economic purposes but does not preclude specialist port and river-related uses.

Port of Tyne

- 8.18 The ELR states:

At Tyne Dock there is 25.38 hectares of available land which, when measured against average annual take-up of 1.28 hectares per annum, represents 19 years of supply. The Port has expended its estate in recent years and has invested heavily in preparing sites to meet current and emerging requirements. Some sites such as the Tyne Dock Enterprise Park

are market ready and attracting interest, whilst at others – such as the Tyne Renewables Quay – site preparation work has been slowed because lower revenues during the pandemic have constrained finance for capital investment. The relatively high supply of land at Tyne Dock can thus to some extent be attributed to the timings of recent expansion and slowed investment, but with high levels of enquiries and strong interest for some sites the Port has advised that it expects improved take-up over the next few years (paragraph 6.53).

- 8.19 The Council considers the Port of Tyne to be a key economic asset for the Borough and the region. As well as the Port providing a real strength in our offer to businesses it is economically significant with the Transportation and Storage sector making up more of our businesses and employing more people locally than is seen in the wider northeast and across England. The importance of the Port for the future developments around IAMP is also critical. With secure storage facilities and a rail distribution terminal the Port of Tyne's car terminal is recognised as a major European vehicle handler and will prove to be an important asset to many manufacturers which decide to use the IAMP as their base. We will continue to work in partnership with the Port of Tyne to grow its international role and to increase the volume of imported and exported goods and associated logistics. The Port of Tyne has been allocated for port and river-related economic development with a total of 24.48 ha of available land.

Mixed-use sites

- 8.20 The ELR also discussed opportunities in relation to mixed use sites. For the reasons set out at Appendix 2 of this paper, the Council considers that only the Holborn regeneration project (ELR ref M9) can be identified as contributing to employment supply. An allowance of 0.69 ha has been made for this project.

Potential Sites

- 8.21 The ELR also assessed several potential sites, with the exception of Wardley Colliery, none of these sites have been taken forward. The Council's response to the ELR assessment of potential sites is set out at Appendix 2 of this paper.

Sites allocated for economic development in the Local Plan

Table 10: Sites for general economic development						
ELR site ref	Policy ref	Location	Size	Wider Allocation	ELR recommendation	STC response
E1		Land at Wagonway Industrial Estate, Hebburn	0.5	Wagonway Industrial Estate, Hebburn	A suitable site on an established industrial estate which has attracted interest from businesses; but as the owner is unwilling to sell or develop, the site is not available	The plot is not currently available and therefore has not been identified as part of the available employment supply. However, it is part of a well-established and successful industrial estate. The Council therefore considers that it would be incongruous to identify it as white land as the intentions of the owner may change and it is included in the Wagonway Industrial Estate allocation.
E22		Former Dow Chemicals, Ellison Street	12.15	n/a	Retain for employment. Council to consider allowing a range of uses including employment and energy generation	Retain allocation
E3		Land East of Pilgrims Way, Bedesway	0.43	Bede Industrial Estate	Council to consider retaining as employment land	Retain allocation
E4		West of Pilgrims Way (east of Mitsumi), Bede Ind Est	1.41	Bede Industrial Estate	Council to consider retaining as employment land	Retain allocation
E27		West of Bedesway / Jarrow Road junction, Bede Ind Est	0.17	Bede Industrial Estate	Smaller than threshold site area of 0.25 ha. Council should consider as potential windfall site within an established employment area. We do	Retain allocation as within an established industrial area but do not include in calculation of available employment land.

					not recommend that the site is allocated for employment.	
E5		North of Tesco, Towers Place, Simonside Ind Est	1.36	Simonside Industrial Estate	Council to consider retaining as employment land	Retain allocation
E7		South of Heddon Way, Middlefields Ind Est	0.61	Middlefields Industrial Estate	Council to consider retaining as employment land	Retain allocation
E28		East of Feller UK, Middlefields Ind Est	0.29	Middlefields Industrial Estate	We do not recommend that the site is identified as an available employment site.	Retain allocation as within an established industrial area but do not include in calculation of available employment land.
E11		Land west of 16 Brooklands Way, Boldon Business Park	0.60	Boldon Business Park	Council to consider retaining as employment land	Retain allocation
Total available 16.63 ha*						

*Excludes sites below the 0.25 ha threshold for allocation

Table 11: Specialist sites – Port of Tyne

ELR site ref	Policy ref	Location	Size	Wider Allocation	ELR recommendation	STC response
E30		Compound beside Jarrow Road	0.25	Port of Tyne	Within Port Estate; Council to consider retaining as specialist employment land.	Retain as specialist employment land.
E16		Tyne Dock Enterprise Park South (Dock infill)	2.60*	Port of Tyne		
E17		Hill 60	0.51	Port of Tyne		
E19		Tyne Dock Enterprise Park (former NcNulty Offshore), Commercial Road	4.36	Port of Tyne		
E31		Tyne Dock Enterprise Park (SE), Commercial Road	0.58	Port of Tyne		
E32		East of wood pellet silos	1.90	Port of Tyne		
E33		Tyne Renewables Quay	9.95	Port of Tyne		
E34		North of Warehouse 21	1.77	Port of Tyne		
E35		Former M H Southern	2.56	Port of Tyne		
Total available 24.48 ha						

*Site reduced in size following the Level 2 Strategic Flood Risk Assessment

Table 12: Mixed use sites

ELR site ref	Policy ref	Location	Size	Wider Allocation	ELR recommendation	STC response
M9		Holborn Regeneration Area - Commercial Road / North of Laygate Street	9.00 (0.69 available for offices)	South Shields Riverside Regeneration Area	Council to consider allocation for office or other use compatible with Planning Use Class E, given the close proximity to residential premises.	Make an allowance for 0.69 ha of employment supply
Total available 0.69 ha						

Table 13: Summary of existing available employment land

Type	Amount (hectares)
General economic development	16.63
Specialist – Port of Tyne	24.48
Mixed use (Holborn)	0.69
Total	41.8

9. Do we need to identify additional employment land for development?

- 9.1 The Council has undertaken a comprehensive assessment of available land in South Tyneside. The ELR and the Council site assessments have concluded that there is 41.70 ha of existing allocated employment land available for economic development.

Table 14: The demand / supply balance with the existing supply of employment sites

Scenario option	Policy-on labour demand (the preferred option)
Land required	41.70 ha
Existing available supply	41.80 ha
Under or overprovision	+ 0.1 ha

The qualitative need

- 9.2 Table 14 compares the supply of existing allocated employment land available with the forecast land requirements from the policy-on labour demand scenarios. There is a quantitative surplus. However, this is marginal, particularly when factoring in that the supply of employment land does not align spatially with market demand. The Council therefore considers that there is a need to identify additional employment land within the Local Plan.
- 9.3 There has been strong demand at Monkton and Boldon Business Parks for industrial space, particularly for move-on accommodation. The Local Economic Assessment found that there is a severe undersupply of industrial space and which could restrict future growth and investment in South Tyneside. Furthermore, the ELR drew attention to the lack of supply relative to demand within the Monkton area.
- 9.4 These findings accord with the experience of the Council's Business Investment Team – that there are regular queries for well-located serviced business space that they are unable to meet because of the shortage of industrial space in locations where there is market demand and that this is acting as a major constraint on growth and investment in South Tyneside.
- 9.5 The ELR comments that activity in the borough has been constrained by a lack of large, good quality sites in strong market locations (ELR page 32). The Council's Economic Development Team concurs with this assessment.

Options for meeting additional employment land

- 9.6 The Regulation 19 Sustainability Appraisal considered three reasonable options for the delivery of additional employment land in South Tyneside:
- **Urban Area**
 - **Other Authorities meeting need**
 - **Green Belt release**

Urban area

- 9.7 It has also been concluded that as a potential source, intensifying operations within existing employment areas would not necessarily yield any significant opportunity to add to our employment land portfolio.

Other authorities

- 9.8 In May 2022, approaches were made to Sunderland City Council, North Tyneside Council and Gateshead Council respectively to as to the degree to which each of our adjoining authorities were able to accommodate some of our unmet needs. All three authorities confirmed that they would be unable to provide for some of our needs. Sunderland stated that, having adopted its Core Strategy and Development Plan in 2020, which established general employment land requirements over the plan period to 2033, it would not be appropriate to plan to meet some of South Tyneside's unmet needs. Gateshead stated that they were not in a position to assist with meeting South Tyneside's employment land needs. North Tyneside stated that the supply of allocated available employment land within North Tyneside has been identified to meet the needs of the borough and that, they can therefore confirm they are unable to accommodate unmet economic needs from South Tyneside.

Green Belt Release

Next Steps

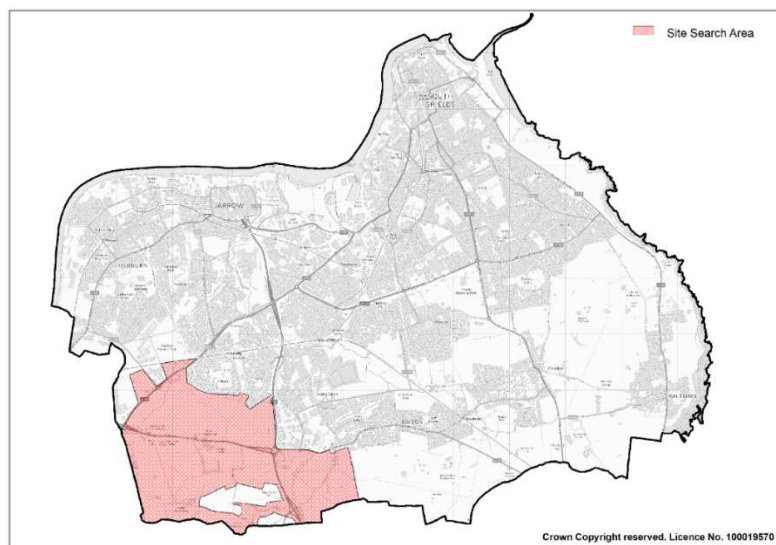
- 9.9 This paper has considered the options available to the Council in identifying and increase in employment land to be allocated within the South Tyneside Local Plan. It has concluded that there are no opportunities for identifying new employment land in an area of strong market demand that would not require the alteration of Green Belt boundaries.
- 9.10 From a purely economic development perspective therefore, the logical next step would be to identify a location suitable for a new business park. However, this would necessitate the release of approximately 25 ha of greenfield land from the Green Belt. Pending consideration of whether this is acceptable and deliverable therefore, the search identified a variety of sites of different sizes for assessment.

10. The search for new employment land

The search area

10.1 The ELR is clear that the demand for employment land in the borough is intimately linked to access to the strategic road network.⁵ Therefore, when considering new sites for employment, the Council firstly identified an area of search (Figure 4) to the western side of the borough.

Figure 4: Area of search for new employment land



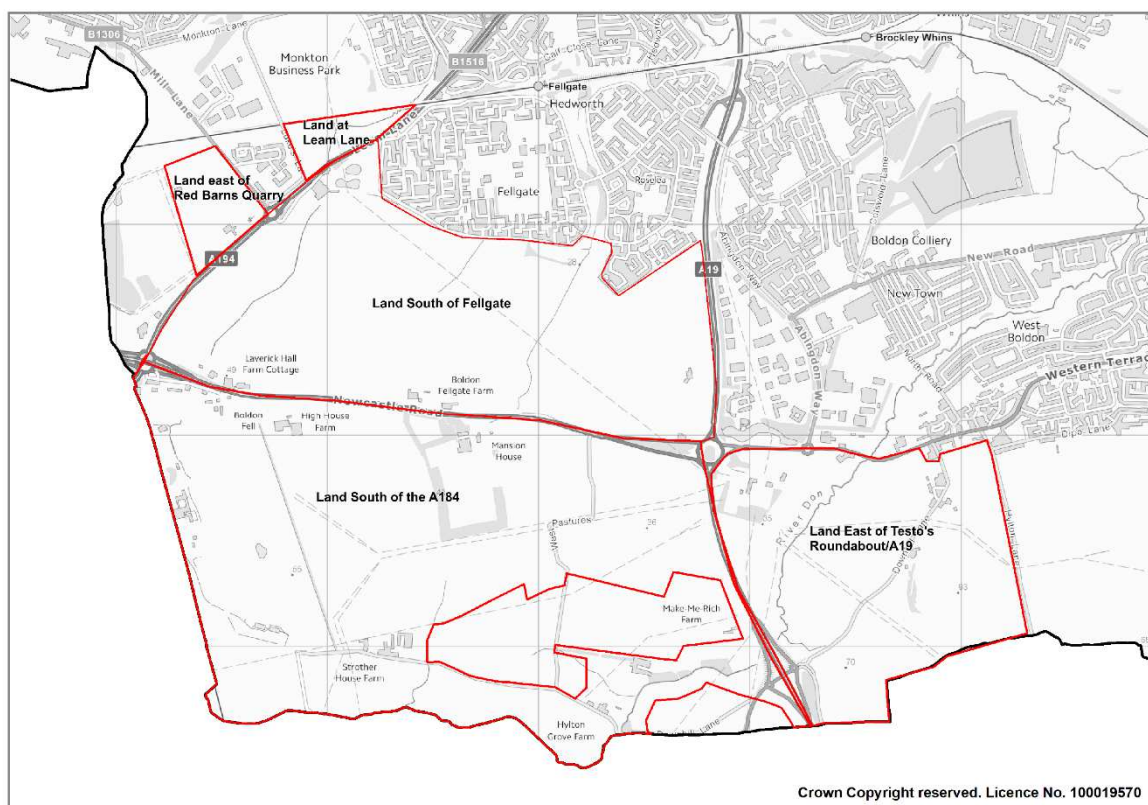
10.2 This area of search was subsequently divided into broad areas, to enable the council to consider significant constraints and narrow down the sites. The areas as shown below (Figure 5) were identified. A mapping exercise was undertaken to identify the constraints to development in each of the area and assess the suitability of each area. This included:

- Biodiversity designations (Local Wildlife Sites, Local Nature Reserves, Local Geodiversity Sites, SSSIs)
- Flood Risk (Zones 2 and 3)
- Heritage designations (Conservation areas, Scheduled Ancient Monuments, Important Archaeological Remains, listed buildings)
- Open space and playing pitches
- Areas of High Landscape Value

10.3 The Council also considered availability of sites for development and potential barriers such as topography and existing uses in the area.

⁵ 'There is particularly strong demand for employment land on the southern edge of the conurbation in locations with easy access to the strategic highway network' (ELR paragraph 6.69).

Figure 5: Broad areas of search



10.4 More detailed assessments were made of smaller land parcels. The following key considerations for a site's suitability were assessed:

- Green Belt impacts
- Site characteristics and development constraints
- Whether the site is designated open space or has playing pitch provision
- Employment Land review assessment of the site
- Whether more than 1% of the site is in Flood zone 2 and/or 3
- Potential ecological impacts
- Potential heritage impacts

10.5 We also took into consideration the availability of each site:

- Willingness to release or sell the site within the plan period
- Whether the site has a sole owner or multiple owners, and the terms of ownership
- Where multiple owners, who owns the remainder of the site
- Whether adjacent owners are promoting their own sites for development collaboratively or independently
- If multiple owners, whether there are any land /ownership constraints including restrictive development covenants, easements and legal agreements, public rights of way which may require variation, 'ransom strips' or other land which the development is dependent on

Existing on-site use(s) which would need to be relocated.

The site assessments

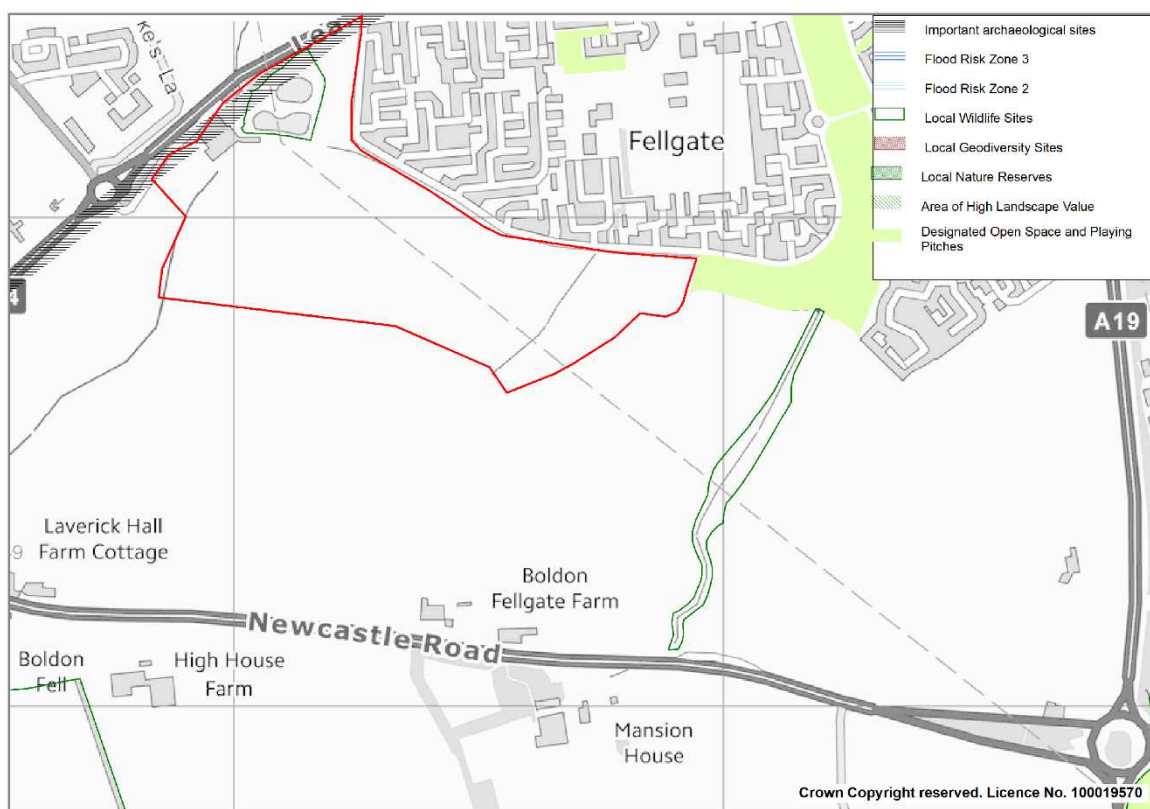
Table 15: Summary of site assessments

Site	Ref	Size	Green Belt Assessment	Recommendation
Land south of Fellgate Urban Extension A	SFG073	35ha	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	The site has been promoted for housing development and has been allocated in the Plan for housing development. It is not available for a new business/industrial park.
Land south of Fellgate Urban Extension B	SFG074	49.7ha	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	The site has been promoted for housing development and part of the site has been allocated in the Plan for housing development. It is not available for a new business/industrial park.
Land south of Fellgate	SFG075	47.23ha	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	The site has been promoted for housing development and has proposed for housing allocation in the Plan for housing development. It is not available for a new business/industrial park.
Eastern Parcel - Land south of Fellgate	SFG076	101ha	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	The site has been promoted for housing development and part of the site has been proposed or housing allocation in the Plan. It is not available for a new business/industrial park.
Western Parcel - Land south of Fellgate	SFG077	107ha	The parcel performs relatively strongly against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	Part of the site is proposed for housing allocation in the Plan and the impact of the development of the site as a whole on the Green Belt would be unacceptable.
Land south west of Fellgate	SFG084	11ha	The parcel performs strongly against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	The Green Belt assessment is significant adverse impacts, and the site falls below the minimum 20 ha site size threshold for a new business/industrial park to be viable.

Site	Ref	Size	Green Belt Assessment	Recommendation
Land West of A19 and Testo's Roundabout	SFG081	35ha	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	The site could be considered as suitable, notwithstanding the concerns of National Highways. However, its southern boundary is adjacent to the A184 which means that it would not align with the boundary of the proposed housing allocation in the Plan.
Land South West of Testo's Roundabout	SFG082	15.3ha	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	The site falls below the minimum 20 ha site size threshold for a new business/industrial park to be viable.
Land south east of Fellgate	SFG083	26.3ha	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	Although it has been promoted for housing development it has not been included in the proposed housing allocation in the Plan. The Council's ecologist has advised that the ecological impacts can be mitigated e.g. through buffering. The site could be considered as suitable, notwithstanding the concerns of National Highways. However the concerns of National Highways are a major issue for this site.
Land at Mypetstop	SFG071	2.28ha	Part of a wider parcel that has been assessed in the 2023 Green Belt Study as scoring high against the purposes of the Green Belt.	The wider parcel has been assessed as scoring highly against the Green Belt purposes, and the site falls below the minimum 20 ha site size threshold for a new business/industrial park to be viable.
Wardley Colliery	SFG066	12.7ha	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.	<p>The site comprises previously developed land and is well-screened thereby reducing the impact of its development on the Green Belt.</p> <p>It is acknowledged that qualitatively the site is not a ready fit for the specific need identified in the ELR i.e., a business/industrial park.</p> <p>However, the site is well situated in relation to the strategic the highway network and there is a willing landowner to take the site forward for employment growth.</p> <p>Opportunities for sustainable travel could be enhanced should the new station proposal materialise;</p>

Site	Ref	Size	Green Belt Assessment	Recommendation
				The site already benefits from existing employment on part of site and could form part of a successful and growing employment area given its proximity to Follingsby Park / Follingsby Max to the west.

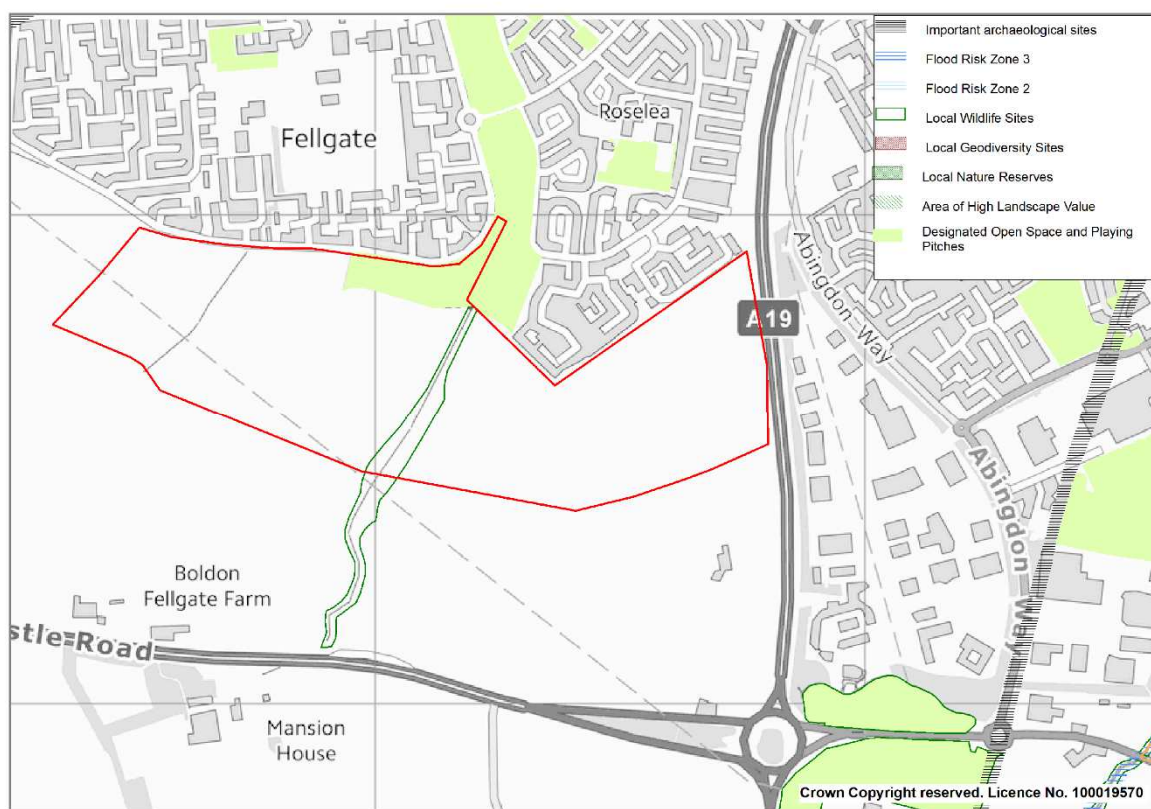
Land south of Fellgate Urban Extension A



SHLAA ref	SFG073
Site size	35ha
Site characteristics and constraints	This parcel is contained by urban development to the north and the strategic road network to the west. The rest of the parcel is defined by field boundaries. Part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows which are gappy in places, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape. There is a Local Wildlife Site in the north western corner.
Green Belt Study outcome	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.
Are there designated open space/playing pitches on the site?	No.

How did the Employment Land Review assess the site?	n/a
Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	<p>Yes. Direct Impacts on the LWS within the site. This site is within wildlife corridors. it would sever the N/S wildlife corridor on its western side. It would sever the E/W wildlife corridor, although there is potentially space to the South of the site to compensate for this.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	There are no suitability constraints that could not be mitigated.
Is the site available?	The site is available for development, but it has been promoted for housing development.
Conclusion	The site has been promoted for housing development and has been allocated in the Plan for housing development. It is not available for a new business/industrial park.

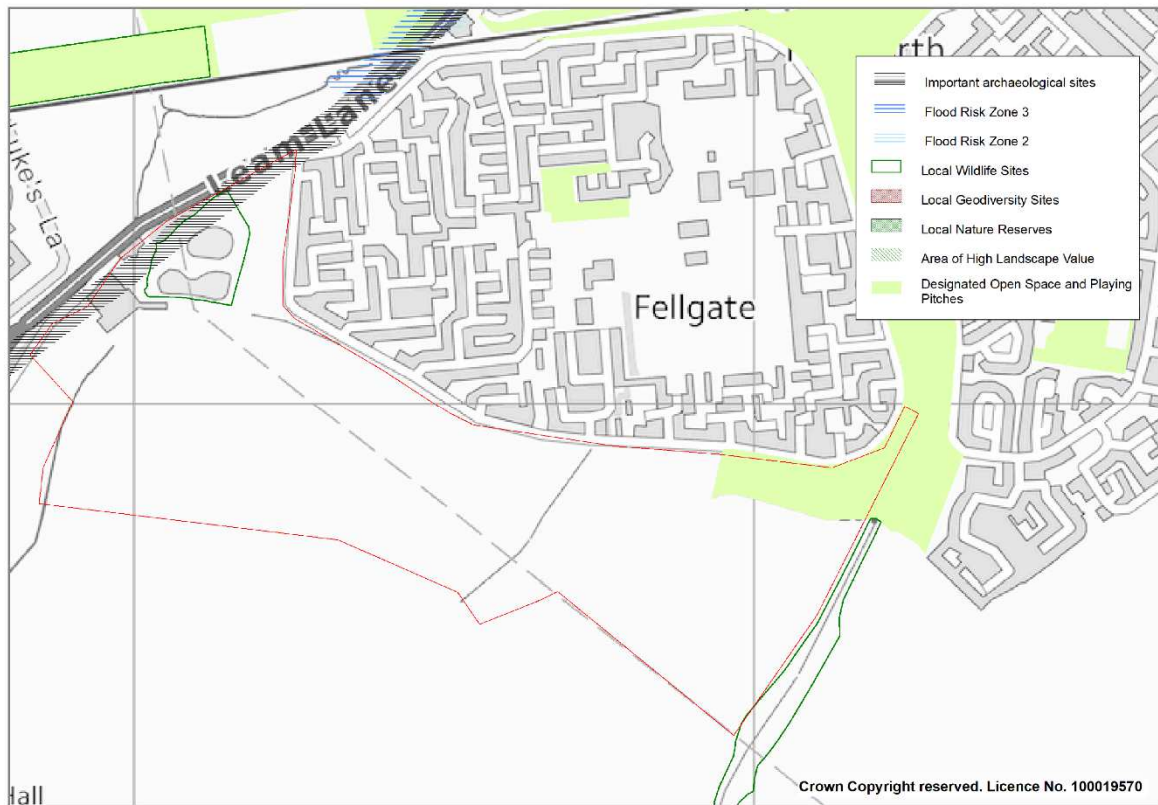
Land south of Fellgate Urban Extension B



SHLAA ref	SFG074
Site size	49.7ha
Site characteristics and constraints	This parcel is contained by urban development to the north and the strategic road network to the east. The rest of the parcel is in parts defined by field boundaries but in areas lacks any durable boundary. Part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows which are gappy in places, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape. There is a Local Wildlife Site running north to south through the middle of the parcel.
Green Belt Review outcome	The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.
Are there designated open space/playing pitches on the site?	Yes, there is a small area of designated open space on the site.

How did the Employment Land Review assess the site?	Part of the site – identified as ‘Land northwest of Testos roundabout’ was assessed in the ELR as follows ‘A very large site with substantial infrastructure costs that would compete with IAMP. Council to consider whether it is premature to allocate for employment.’
Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	<p>Yes. Direct Impacts on the LWS within the site. The site is within wildlife corridors – it would sever the N/S wildlife corridor through its centre. It would sever the N/S wildlife corridor, on its eastern side.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	There are no suitability constraints that could not be mitigated but National Highways will have concerns regarding the relationship to the strategic highway network.
Is the site available?	The site is available for development, but it has been promoted for housing development.
Conclusion	The site has been promoted for housing development and part of the site has been allocated in the Plan for housing development. It is not available for a new business/industrial park.

Land south of Fellgate



SHLAA ref

SFG075

Site size

47.23ha

Site characteristics and constraints

This parcel is contained by urban development to the north and the strategic road network to the east. The rest of the parcel is in parts defined by field boundaries but in areas lacks any durable boundary. Part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows which are gappy in places, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape. There is a Local Wildlife Site in the north west corner of the site and another Local Wildlife Site running along the eastern boundary.

Green Belt Review outcome

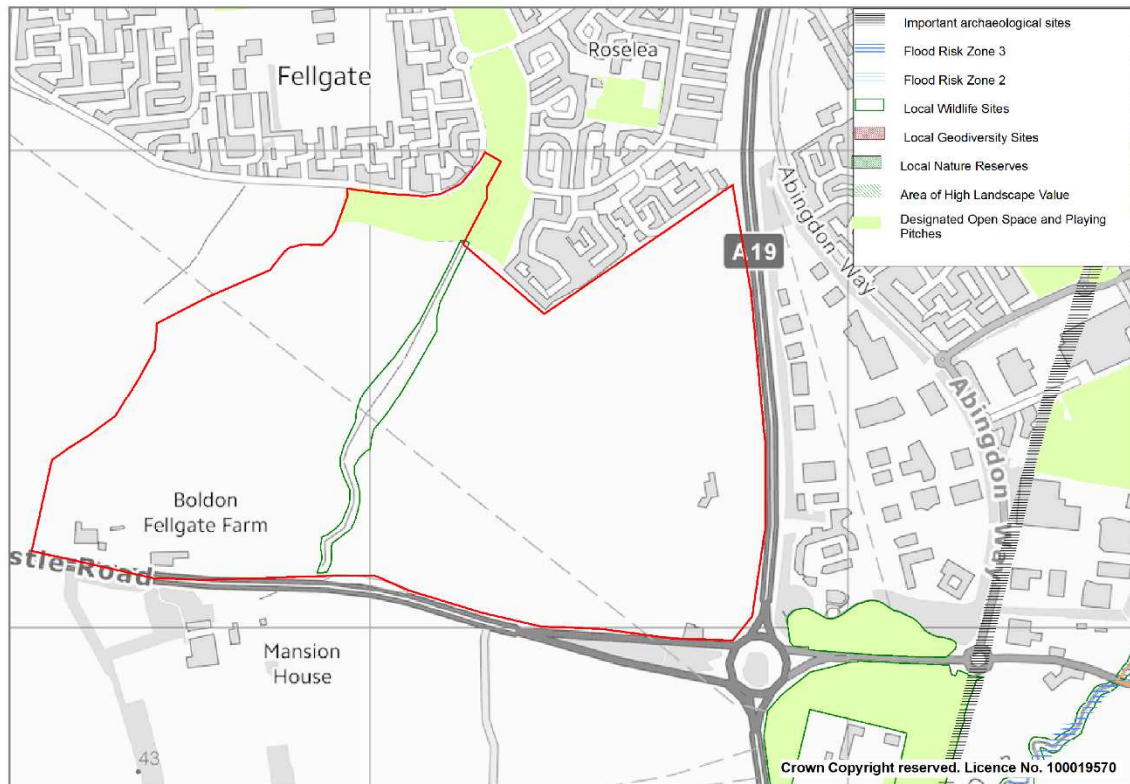
The parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt.

Are there designated open space/playing pitches on the site?

Yes, there is a small area of designated open space on the site.

How did the Employment Land Review assess the site?	n/a
Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	<p>Yes. Direct Impacts on the LWS within the site & potential for indirect impacts on the LWS adjacent. This site is within wildlife corridors. it would sever the N/S wildlife corridor on its western side. It would sever the E/W wildlife corridor, although there is potentially space to the south of the site to compensate for this.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	There are no suitability constraints that could not be mitigated but National Highways will have concerns regarding the relationship to the strategic highway network.
Is the site available?	The site is available for development, but it has been promoted for housing development.
Conclusion	The site has been promoted for housing development and has proposed for housing allocation in the Plan for housing development. It is not available for a new business/industrial park.

Eastern Parcel - Land south of Fellgate



SHLAA ref	SFG076
Site size	101ha
Site characteristics and constraints	<p>This parcel is contained by urban development along two boundaries to the north and east, with the southern boundary contained by the strategic road network. The western boundary follows a collection of field boundaries. These large-scale arable fields are part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows which are sparse in places, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape. There is a Local Wildlife Site running north to south through the middle of the parcel.</p>
Green Belt Review outcome	<p>The northern and eastern areas of the parcel perform moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt. However, the area to the southwest falls within an area that performs highly.</p>
Are there designated open space/playing pitches on the site?	No.

How did the Employment Land Review assess the site?	Part of the site – identified as ‘Land northwest of Testos roundabout’ was assessed in the ELR as follows ‘A very large site with substantial infrastructure costs that would compete with IAMP. Council to consider whether it is premature to allocate for employment.’
Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	<p>Yes. Direct Impacts on the LWS within the site. This site is within wildlife corridors. It would sever the N/S wildlife corridor on its western side. It would sever the N/S wildlife corridor on its eastern side It would sever the E/W wildlife corridor.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	There are no suitability constraints that could not be mitigated but National Highways will have concerns regarding the relationship to the strategic highway network.
Is the site available?	The site is available for development, but it has been promoted for housing development and part of the site has been proposed for housing allocation in the Plan.
Conclusion	The site has been promoted for housing development and part of the site has been proposed or housing allocation in the Plan. It is not available for a new business/industrial park.

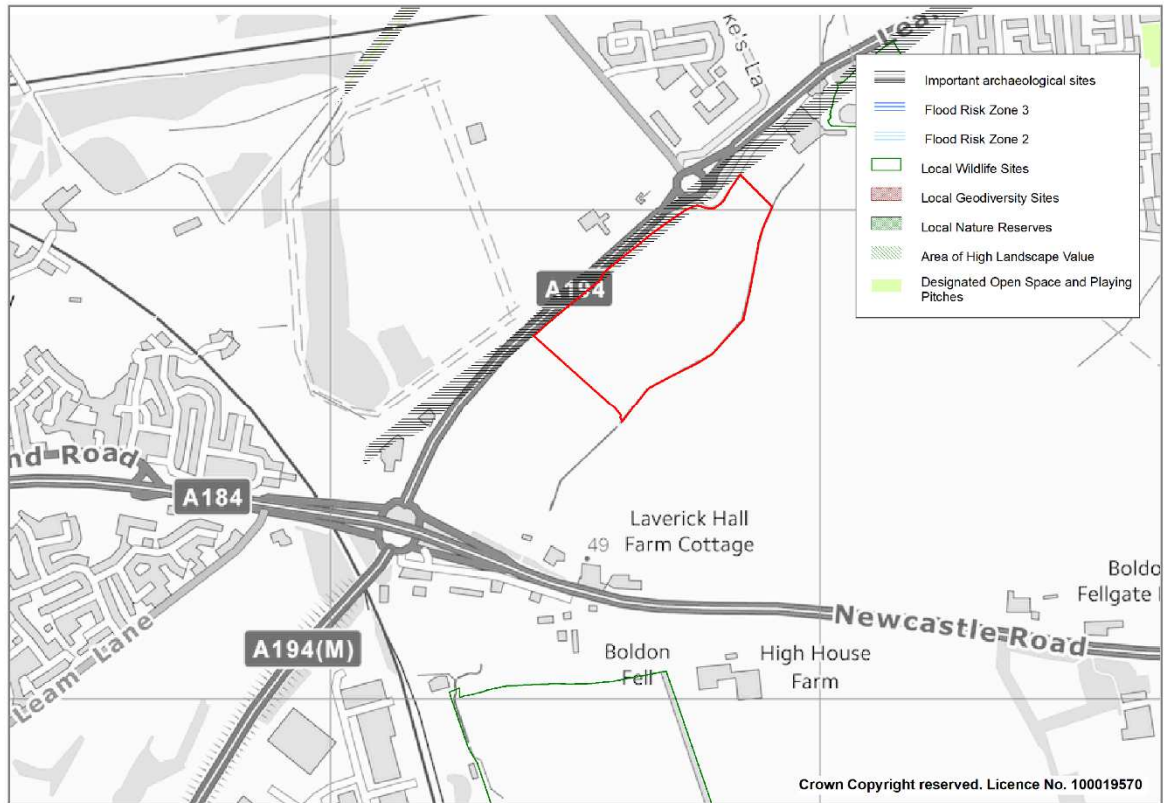
Western Parcel - Land south of Fellgate



SHLAA ref	SFG077
Site size	107ha
Site characteristics and constraints	This parcel is contained by urban development to the north and the strategic road network to the south and west. The rest of the parcel is defined by field boundaries. Part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape. There is a Local Wildlife Site in the northwestern corner.
Green Belt Review outcome	The northern area of the parcel performs moderately against the NPPF purposes and the contribution it makes to the overall integrity of the wider strategic Green Belt. The south falls within an area that performs very highly.
Are there designated open space/playing pitches on the site?	No.
How did the Employment Land Review assess the site?	n/a

Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	<p>Yes. Direct Impacts on the LWS within the site. This site is within wildlife corridors. It would sever the N/S wildlife corridor on its western side. It would sever the E/W wildlife corridor.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	National Highways will have concerns regarding the relationship to the strategic highway network particularly in respect of White Mare Pool interchange. The Green Belt assessment is adverse impacts.
Is the site available?	The site is available for development, but it has been promoted for housing development and part of the site is proposed for housing allocation in the Plan.
Conclusion	Part of the site is proposed for housing allocation in Plan and the impact of the development of the site as a whole on the Green Belt would be unacceptable.

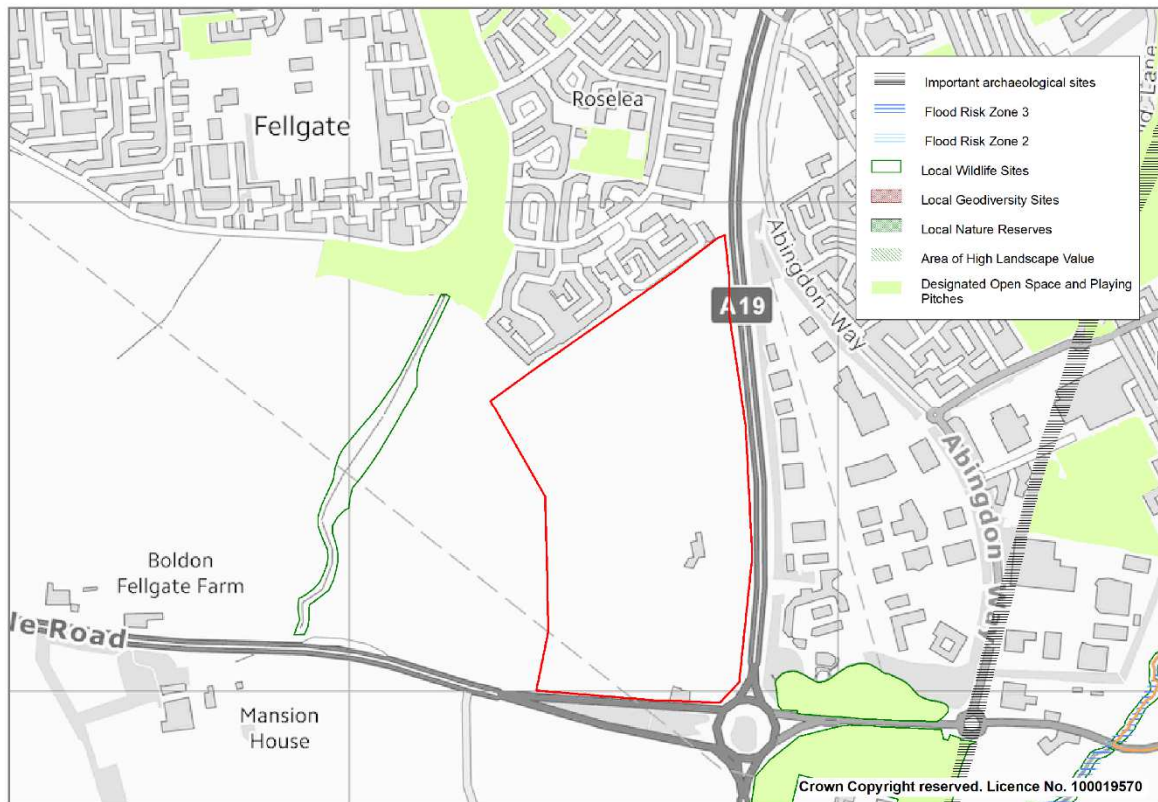
Western Parcel - Land south of Fellgate



SHLAA ref	SFG084
Site size	11ha
Site characteristics and constraints	This parcel is contained by the strategic road network along one boundary. The remainder of the parcel is defined by field boundaries. Part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows which are gappy in places, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape.
Green Belt Review outcome	The parcel performs very highly against the NPPF purposes.
Are there designated open space/playing pitches on the site?	No.
How did the Employment Land Review assess the site?	The ELR assessment is 'Council to consider allocating for employment'.
Is more than 1% of the site within Flood Zone 2 and/or 3	No.

Would development have direct or indirect ecological consequences	<p>Yes. This site is within wildlife corridors. It would sever the N/S wildlife corridor. although there is potentially space to the east of the site to compensate for this. It would sever the E/W wildlife corridor although there is potentially space to the south of the site to compensate for this.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	The Green Belt assessment is significant adverse impacts.
Is the site available?	The site is available for development, but it has been promoted for housing development.
Conclusion	The Green Belt assessment is significant adverse impacts, and the site falls below the minimum 20ha site size threshold for a new business/industrial park to be viable.

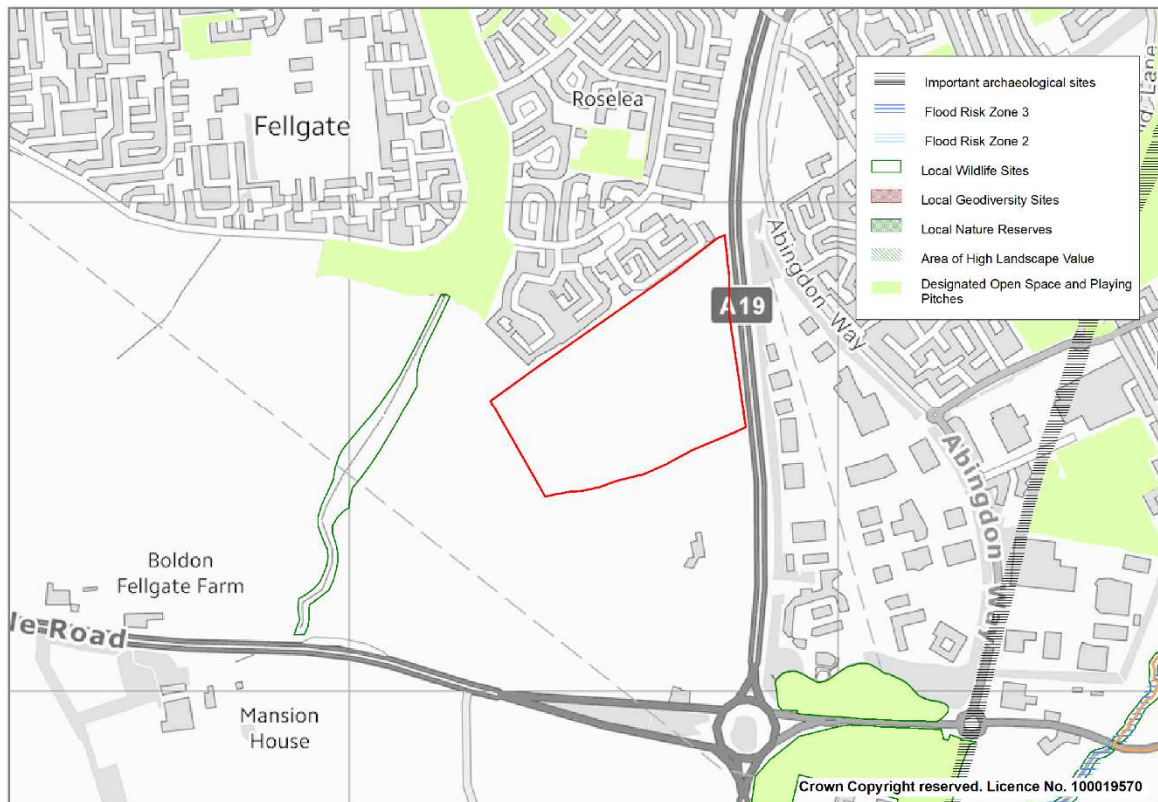
Land West of A19 and Testo's Roundabout



SHLAA ref	SFG081
Site size	35ha
Site characteristics and constraints	This parcel is contained by the strategic road network along two boundaries and a built settlement to the north. The remainder of the parcel is defined by field boundaries. Part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows which are gappy in places, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape.
Green Belt Review outcome	The parcel performs moderately against the NPPF purposes.
Are there designated open space/playing pitches on the site?	No.
How did the Employment Land Review assess the site?	The ELR assessment is 'A very large site with substantial infrastructure costs that would compete with IAMP. Council to consider whether it is premature to allocate for employment.'

Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	<p>Yes. This site is within wildlife corridors. It would sever the N/S wildlife corridor.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	National Highways will have concerns regarding the relationship to the strategic highway network.
Is the site available?	The site is available for development, but it has been promoted for housing development.
Conclusion	The site could be considered as suitable, notwithstanding the concerns of National Highways. However, its southern boundary is adjacent to the A184 which means that it would not align with the boundary of the proposed housing allocation in the Plan. For this reason, it is not considered appropriate to take it forward to allocation.

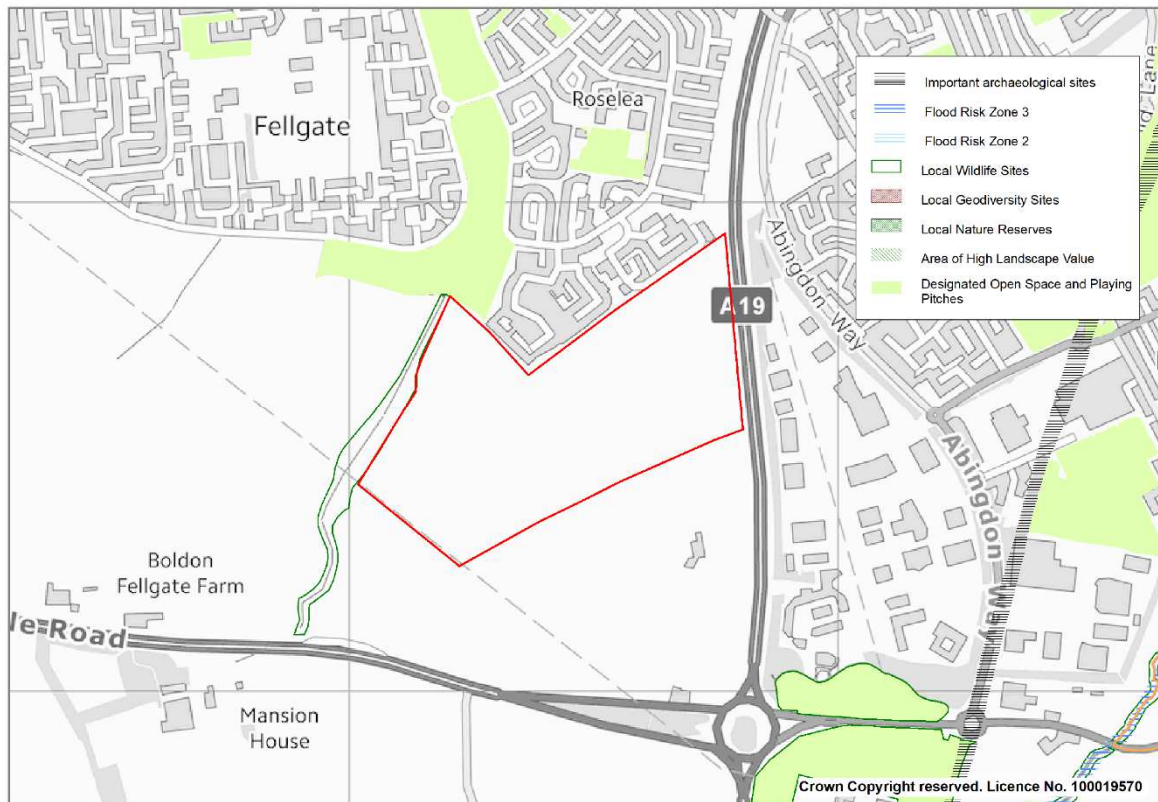
Land South West of Testo's Roundabout



SHLAA ref	SFG082
Site size	15.3
Site characteristics and constraints	This parcel is contained by the strategic road network along one boundary and abuts the settlement boundary to the north. The remainder of the parcel is defined by field boundaries. Part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows which are gappy in places, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape.
Green Belt Review outcome	The parcel performs moderately against the NPPF purposes.
Are there designated open space/playing pitches on the site?	No.
How did the Employment Land Review assess the site?	The site forms part of a larger site identified as 'Land northwest of Testos roundabout' that was assessed in the ELR as follows 'A very large site with substantial infrastructure costs that would compete with IAMP.

	Council to consider whether it is premature to allocate for employment.'
Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	<p>Yes. This site is within wildlife corridors. It would sever the N/S wildlife corridor.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	National Highways will have concerns about the relationship of the site to the strategic highway network.
Is the site available?	The site is available for development, but it has been promoted for housing development.
Conclusion	The site falls below the minimum 20ha site size threshold for a new business/industrial park to be viable.

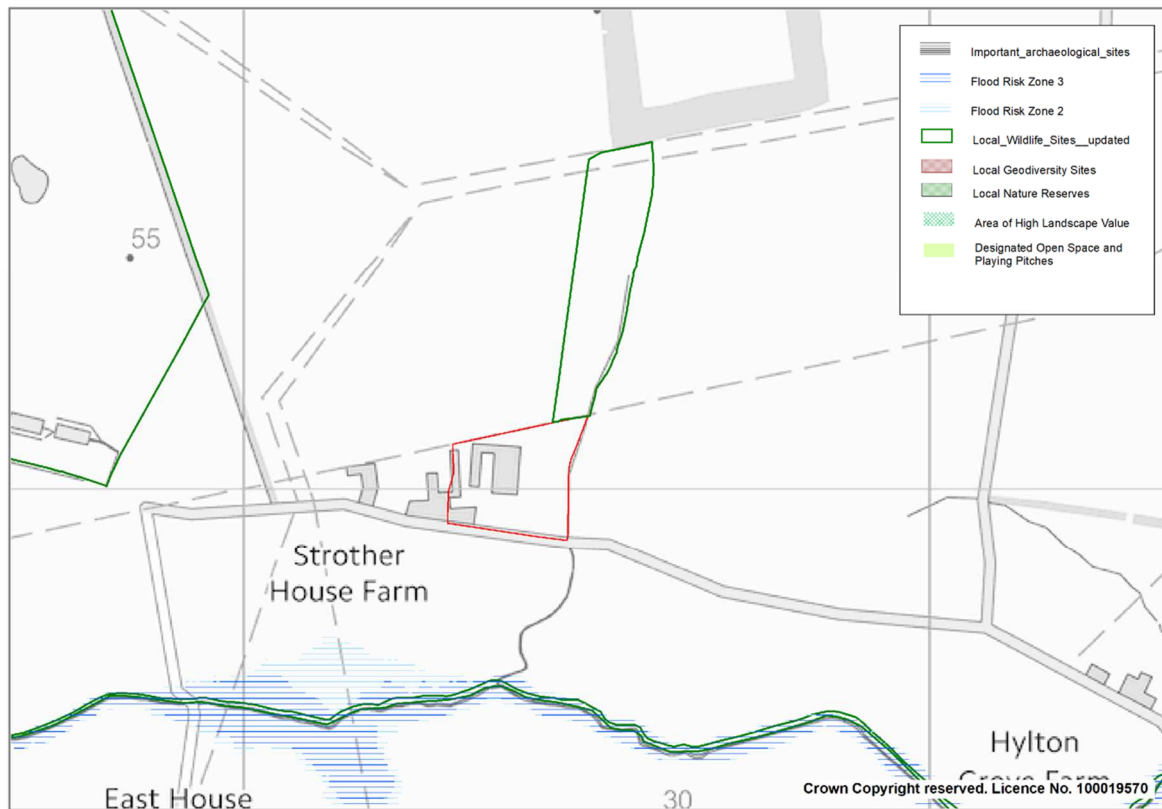
Land south east of Fellgate



SHLAA ref	SFG083
Site size	26.3ha
Site characteristics and constraints	This parcel is contained by the strategic road network along one boundary. The remainder of the parcel is defined by field boundaries. Part of the Boldon Fell Landscape Character Area. Field boundaries are generally defined by hedgerows which are sparse in places, with scattered hedgerow trees, although there is an element of exposure where views over hedgerows are available within the rolling landscape.
Green Belt Review outcome	The parcel performs moderately against the NPPF purposes.
Are there designated open space/playing pitches on the site?	No.
How did the Employment Land Review assess the site?	The site forms part of a larger site identified as 'Land northwest of Testos roundabout' that was assessed in the ELR as follows 'A very large site with substantial infrastructure costs that would compete with IAMP.

	Council to consider whether it is premature to allocate for employment.'
Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	<p>Yes. Indirect impacts on the LWS adjacent. This site is within wildlife corridors. It would sever the N/S wildlife corridor and impacts the E/W corridor.</p> <p>The open farmland in this area with hedgerows and scrub supports a wide range of farmland birds, many of which are priority species and/or high on the list of conservation concern. Cumulative impacts are a key consideration for birds in this habitat.</p>
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	National Highways will have concerns regarding the relationship to the strategic highway network.
Is the site available?	The site is available for development, but it has been promoted for housing development.
Conclusion	<p>Although it has been promoted for housing development it has not been included in the proposed housing allocation in the Plan. The Council's ecologist has advised that the ecological impacts can be mitigated e.g., through buffering. The site could be considered as suitable, notwithstanding the concerns of National Highways. However, the concerns of National Highways are a major issue for this site. In contrast to the Wardley Colliery site it would involve greenfield development and although it performs moderately against Green Belt purposes, it does not benefit from being well-screened as does the Wardley Colliery site.</p>

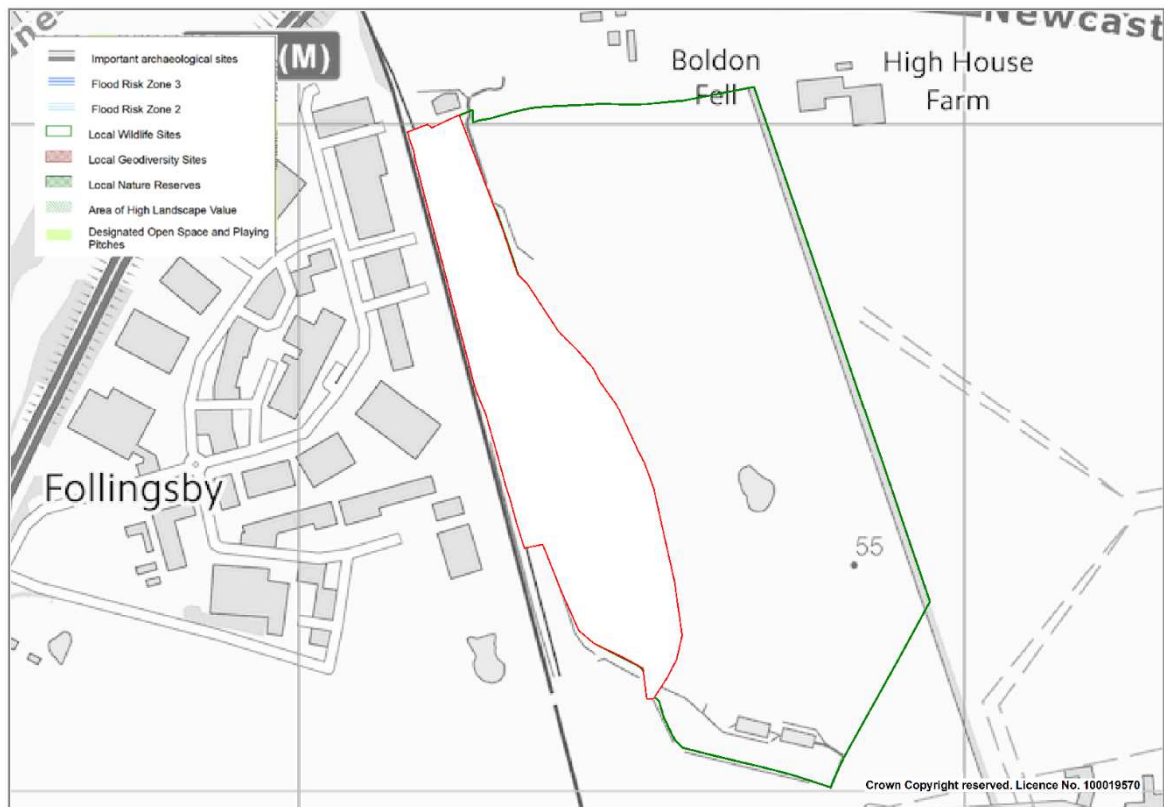
Land at Mypetstop



SHLAA ref	SFG071
Site size	2.28 ha
Site characteristics and constraints	Part of the Boldon Fell Landscape Character Area. The site suffers from both surface water and ground water flooding and forms part of the wildlife corridor.
Green Belt Study outcome	<p>Part of a wider parcel that has been assessed in the 2023 Green Belt Study as scoring high against the purposes of the Green Belt.</p> <p>Release and development of the parcel would expand the size of the IAMP, which would reduce the distance between this inset area and the surrounding urban areas that form part of the Tyne and Wear conurbation, increasing their association. Release would also weaken the distinction of surrounding Green Belt, but particularly to the north where the boundary is weak.</p>
Are there designated open space/playing pitches on the site?	No.
How did the Employment Land Review assess the site?	As previously developed land within but on the edge of the Green Belt and adjoining allocated employment land the Council should consider allocating for employment or other compatible use.

Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	Yes. Protected species and priority and priority habitats are considered unlikely, though priority species could be present in the vicinity. The site is immediately adjacent to Strother House Farm Local Wildlife Site.
Could development cause harm to heritage assets?	No
Is the site suitable?	The site is not considered to be suitable – impact on the Green Belt.
Is the site available?	The site is available for development, it has been promoted for economic development
Conclusion	The wider parcel has been assessed as scoring highly against the Green Belt purposes. It is not considered to be a reasonable option.

Wardley Colliery



SHLAA ref	SFG066
Site size	12.7ha
Site characteristics and constraints	The site is well screened as it is below the adjoining soil heap. The western edge of the parcel has been redeveloped, whilst the remainder, and larger portion, of the site remains an industrial landscape that follows the western boundary of a Local Wildlife Site. The neighbouring authority of Gateshead is extending the adjacent industrial estate. The scale of outward growth could therefore be regulated as a result of these established and robust durable features, thus restricting sprawl, and preventing further encroachment.
Green Belt Review outcome	The parcel performs moderately against the NPPF purposes.
Are there designated open space/playing pitches on the site?	No.
How did the Employment Land Review assess the site?	The site forms part of a larger site identified as 'Wardley Commerce Park, Follingsby Lane, Wardley' that was assessed in the ELR as follows 'Council to consider allocating for employment.' The site identified in the

	ELR includes the LWS. The Council is not proposing to include the LWS in the site apart from a small area of the LWS which falls within the site.
Is more than 1% of the site within Flood Zone 2 and/or 3	No.
Would development have direct or indirect ecological consequences	Yes. Indirect impacts on the LWS adjacent.
Could development cause harm to heritage assets?	Development would cause less than substantial harm
Is the site suitable?	National Highways will have concerns regarding the relationship to the strategic highway network.
Is the site available?	Yes – the site is being promoted for employment allocation on behalf of the site owners.
Conclusion	<p>The site comprises previously developed land and is well-screened thereby reducing the impact of its development on the Green Belt.</p> <p>Subject to the scale of land to be released, it could make a significant contribution to meeting the quantitative need for general employment land identified in the ELR. However, it is acknowledged that qualitatively the site is not a ready fit for the specific need identified in the ELR i.e., a business/industrial park.</p> <p>The site is well situated in relation to the strategic the highway network.</p> <p>Opportunities for sustainable travel could be enhanced should the new station proposal materialise.</p> <p>There is a willing landowner to take the site forward for employment growth.</p> <p>The site already benefits from existing employment on part of site and could form part of a successful and growing employment area given its proximity to Follingsby Park / Follingsby Max to the west.</p>

Conclusion

10.6 Following the identification of the site search area, potential sites have been identified and assessed. The assessment has ruled out several sites for one of the following reasons:

- Promoted for housing development and not available for a new business/industrial park;
- The impact of development on the Green Belt would be unacceptable;
- The site falls below the minimum 20ha site size threshold for a new business/industrial park to be viable;
- It would not align with the boundary of the proposed housing allocation (Fellgate Sustainable Growth Area) in the Plan;
- The concerns of National Highways are a major issue with the site; and
- The wider parcel has been assessed as scoring highly against the Green Belt purposes.

10.7 It is acknowledged that the Wardley Colliery site is not a ready fit for the specific need identified in the ELR i.e., a business/industrial park. However, it is not feasible to take forward a strategic scale site (i.e. approx. 25 ha site) to due lack of suitable and available sites and the Green Belt impact. In considering this option the Council has had to balance its economic growth aspirations with the desirability of maintaining Green Belt boundaries.

10.8 For the reasons set out in this section of this paper, the Wardley Colliery site is considered to provide a sensible compromise between making a significant contribution to meeting economic development needs and minimising the impact on the Green Belt.

10.9 The Council has concluded that Wardley Colliery is a suitable location for economic development. Chapter 11 of this report justifies why the Council consider that Wardley Colliery is a suitable and deliverable employment site.

11. Wardley Colliery

Introduction and background

- 11.1 Wardley Colliery is an area of previously developed land, situated in the southwest of the borough, near White Mare Pool Interchange (to the north of the site), IAMP and the Follingsby logistics park (to the west of the site) which is within the Gateshead boundary. The site also has rail connections which are not currently operative.
- 11.2 Acquired by Harworth Estates in 1995, Wardley is a former coal processing and disposal site that was operational in the early 1990's. Since that time it has been occupied by several uses, including permanent container storage and the temporary storage of material from the Tyne Tunnel construction works.
- 11.3 In 2015, Harworth Estates demolished the redundant coal plant and most of the site is now vacant, except for the northern section of the site, where approximately 1.9 hectares is currently being used for container storage and distribution. Toward the south of the site on a parcel of land has been developed an anaerobic digester plant to generate renewable energy through the treatment of by-products from the food industry, which was granted permission in 2014.
- 11.4 The Wardley Colliery site is an unusual site that is not easily categorised but falls under the category of general employment land. The current site owner is promoting the designation of the site as employment land.
- 11.5 It is estimated that 6.71 ha of land at Wardley Colliery is the net available area. This makes allowance for the container storage area (1.36ha), the anaerobic digester (2.3ha) and the land which it is proposed to safeguard for a station and associated car parking (1.4ha).

Ecology

- 11.6 The Wardley Colliery Local Wildlife Site is approximately 43.95ha in size and was confirmed as a Local Wildlife Site within the Council's Local Development Framework in August 2011. The Wardley Colliery Local Wildlife Site is the largest open mosaic habitat on previously developed land in South Tyneside and is the most valuable example of its type in the borough. The NPPF is clear on the desirability of conserving and enhancing nature conservation.
- 11.7 A small area of the Local Wildlife Site falls within the wider Wardley Colliery site. It also falls within an area consented for employment use. This does not alter its Local Wildlife Site status, but this specific area of the Local Wildlife Site falls out with the Green Belt.
- 11.8 Haycock and Jay Associates Ltd were commissioned by South Tyneside Council to undertake an ecological survey and assessment of Wardley Colliery Local Wildlife Site in October 2020. The purpose of the survey was to identify Durham Biodiversity Action Plan (BAP) Priority Habitats and assess habitats present against existing Local Wildlife Site Selection Criteria (2013). The survey found that the majority of the existing Local Wildlife Site meets the criteria to justify its designation as a Local Wildlife Site, however the current boundary encompasses the recently completed anaerobic digestion facility and bare ground and spoil which was being

worked at the time of the survey. The resulting report recommends a modest revision to the current Local Wildlife Site boundary along its western edge to exclude this area from the Local Wildlife Site designation. This proposed Local Wildlife Site boundary change has not yet been ratified by the Local Sites Partnership.

- 11.9 For clarity, it is proposed to exclude the Local Wildlife Site from the overall Wardley Colliery allocation (apart from the small area referenced at paragraph 11.7 of this paper) and to retain its Green Belt designation. The proposed boundary between the area allocated for development and the Local Wildlife Site is consistent with the recommendation in the ecological report by Haycock and Jay Associates Ltd. However, the proposed allocation is supported by the Council's Countryside Officer, subject to the allocation policy incorporating the requisite safeguards.

Map 1: Proposed Wardley Colliery allocation and the Local Wildlife Site



The rationale for amending the Green Belt boundary in this location

- 11.10 The Council considers that there is a need to identify additional employment land and there are no opportunities to do so that would not involve encroachment onto the Green Belt.
- 11.11 Against the purposes of the Green Belt, the site is considered to perform moderately. The site is physically and visually well contained by existing features and the potential allocation would be confined to sheltered low-lying ground. The impact on the wider remaining Green Belt would be limited. The full assessment can be found in the Green Belt Study, undertaken by Land Use Consultants.
- 11.12 The site is located in close proximity to the A184 / A194 junction which is a key strategic junction and lies adjacent to the Leamside Line; the Local Plan supports the long-term ambitions of partners to re-open the line. It therefore offers an excellent opportunity for businesses that would require transport links and that are able to operate effectively within this distinctive site. Opportunities for sustainable travel could be enhanced should the new station proposal materialise. There are currently bus stops within 400m of the northern boundary of the site. The SA identifies that it will have a positive effect in relation to the 'Promote sustainable transport and accessibility' SA objective.
- 11.13 A site-specific sustainability appraisal has been undertaken as part of the assessment for reasonable options. The sustainability appraisal (SA) identifies minor negative effects against climate change, due to surface water flooding and carbon audit findings; and green infrastructure due to the potential impact on the wider green infrastructure corridor. Significant negative effects have been identified against mineral workings and biodiversity due to its proximity to the Local Wildlife Site. The site scores very positively against the SA objective 9 '*Encourage and support economic growth within South Tyneside and objective 10 'Increase opportunities for employment, education and improve living standards'*'; due to the site's ability to support employment growth. The site already benefits from existing employment on part of site and could form part of a successful and growing employment area given its proximity to Follingsby Park / Follingsby Max to the west.
- 11.14 Amending the Green Belt boundary in this location would acknowledge the reality that the site not only has an industrial history but that parts of the site are already in commercial operation. Although the site provides an excellent opportunity for Thomas Armstrong Ltd⁶ to expand, it is recognised that commercial realities can change. The deliverability of the site is not critically dependent on the plans of Thomas Armstrong Ltd as the proximity of the site to the strategic road network means that it has general attractiveness for B2 use. It should be noted that the ELR states '*... it is considered reasonable to expect future employment performance of general industrial sectors (B2) to outstrip past trends by a considerable margin*' (Paragraph 7.40).

⁶ Thomas Armstrong Ltd have purchased the site in order that it can in part provide an opportunity for the relocation of existing B2 manufacturing facilities that the company operates within the northeast of England. Thomas Armstrong Ltd at present operate a block paver factory at Consett and a concrete block factory at Rowlands Gill. Both factories now require significant upgrading of their plant. Based on the market demand there is also a requirement for an expansion of these production operations. Neither of the current existing sites are however capable of undertaking the increased operations and it was therefore identified that a single new site should be developed which would amalgamate these production facilities through the provision of a new production plant located at Wardley Colliery. The Wardley Colliery Site provides the opportunity to bring both facilities together with the creation of an entirely new B2 production unit together on one site.

11.15 The site represents previously developed land. The reuse of previously developed land is a key objective of the NPPF. Most of the previously developed land has now been cleared and consists of hardstanding. The site would have a very positive effect against SA objective 4 'Protect our soils and promote efficient land use'. The SA comments 'The development of this site would not result in the loss of soils as it is brownfield land; therefore, development would be considered to have a significant positive effect in relation to this objective.'

11.16 The Green Belt Exceptional Circumstances paper (2024) considers whether exceptional circumstances have been demonstrated to justify an alteration to the Green Belt in this location.

12. Summary and Conclusion

Summary

Understanding Business needs

12.1 The ELR has been informed by extensive engagement with local stakeholders and businesses.

Key messages and findings include:

- Advanced manufacturing and energy, focused around IAMP and the Port of Tyne were recognised as key sectoral strengths.
- Much of the borough's portfolio of sites is made up of smaller sites in areas of weaker market demand which has constrained the borough's ability to compete for investment opportunities.
- There is a need for more incubation and move-on space.
- There is a limited range and choice of office space, particularly smaller offices.
- The employment land stock includes sites that are poor quality and would require considerable investment to make them attractive to occupiers.

What is the current employment land supply position?

12.2 The overall available employment land supply is made up of 3 categories:

- General employment land: 28.84 ha
- Specialist – port/river access: 25.38 ha
- Specialist – advanced manufacturing (IAMP): 51.25 ha

12.3 The supply from the IAMP has not been factored into the ELR. This is because the IAMP has its own adopted development plan document (the cross-boundary IAMP Area Action Plan) and associated evidence base. However, IAMP has sub-regional significance and underpins the Council's Preferred Forecasting Scenario. A chapter of this report has therefore documented the planning policy framework and delivery associated with it. The chapter concluded that the delivery IAMP is very important to both South Tyneside and Sunderland Councils and there is a clear economic rationale for reflecting this in the forecast employment space requirements.

Removing sites that are not deliverable

12.4 The study considered the deliverability of employment sites in calculating employment land supply. Following this assessment, several sites were removed from the supply. The amount of general employment land has decreased to 16.63 ha due to removal of these sites.

The Council's preferred forecasting scenario

12.5 The Council's preferred scenario for determining the employment space needs is the Policy-on labour demand scenario as this seeks to capture the growth opportunities associated with IAMP. The ELR cautions that to fully take advantage of these opportunities will require good quality employment sites with excellent links to the strategic road network.

The demand / supply balance

12.6 A very clear message from the ELR is that there is a demand 'hotspot' in the southwest of the borough where there is good access to the strategic road network but also Green Belt constraints. The existing supply is predominantly in the north of the borough, but this is an area of weaker market demand, and the supply is very tight.

Potential new sites

12.7 To address the spatial imbalance in the distribution of employment land, the Council has conducted a site search focused on the southwest of the borough. In purely economic terms, a strategic scale i.e. circa 25 ha site would be preferred. However, for the reasons stated in the site specific assessment, this is not considered to be deliverable. The following three parcels of land have been identified that collectively comprise the Wardley Colliery site that has been assessed through the site specific assessment and also considered through the Stage 3 Green Belt Review and the Sustainability Appraisal. Table 16 shows how the STC Officer response to the ELR recommendations for two of these parcels and the promotion of the other parcel for allocation.

Table 16: New sites					
ELR site ref	Policy ref	Location	Size (ha)	ELR recommendation	STC Officer response
P4a		Western part of former Wardley coal disposal point, Follingsby Lane, Wardley	3.65	Council to consider allocating for employment as part of Green Belt review.	Allocate employment land at Wardley Colliery and include this parcel in the allocation.
n/a		Additional plot to the north of P4a	1.4	n/a (The agent representing Walker Armstrong (the site owner) has identified additional land that is also available for development)	Allocate employment land at Wardley Colliery and include this parcel in the allocation.
P4b		Eastern part of former Wardley Coal Disposal Point, Follingsby Lane, Wardley	1.66	Council to consider allocating for employment as part of Green Belt review.	Allocate employment land at Wardley Colliery and include this parcel in the allocation.
Total available 6.71 ha					

Conclusion

12.8 To address the specific qualitative need for a new business / industrial park would require the removal of a major area of greenfield land (the minimum site size for a new business / industrial park to be viable is estimated to be 25 ha) from the Green Belt. Whilst fully recognising the benefits such a development would bring, the Council has made the decision to prioritise the maintenance of Green Belt boundaries, given the scale of Green Belt deletion that would be required.

12.9 However, the Council is proposing the removal of the Wardley Colliery site from the Green Belt to allocate it for general economic development. This surplus is very modest and makes no allowance for the spatial imbalance in the distribution of employment land in the context of market demand. Although the proposed removal of the Wardley Colliery site from the

Green Belt would involve a Green Belt deletion, the site is previously developed and very well-screened and parts of the site already have commercial activity following the implementation of planning consents. Table 17 shows the overall demand/supply balance both with and without the allocation of Wardley Colliery.

Table 17: The demand / Supply balance for general and specialist - Port of Tyne employment land with and without the addition of Wardley Colliery

Type	Amount (hectares)
General economic development	16.63
Specialist – Port of Tyne	24.48
Mixed use	0.69
Existing supply	41.8
Requirement (Policy-on labour demand scenario)	41.7
Under/Over provision	+0.1
Wardley Colliery	6.71
Under/Over provision	+6.72
Total supply	48.51

Appendix 1 Forecasting employment land requirements 2023-2040 for South Tyneside

1. Context

This short note sets out the context for the employment and land forecasts set out in the Local Plan.

As the Local Plan makes clear, the NPPF (July 2021) requires local authorities to “set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration.” (Paragraph 82.a)

In addition, the PPG on Housing and Economic Needs Assessment (December 2020) advises that “strategic policy making authorities will need to develop an idea of future needs based on a range of data which is current and robust.” The PPG also suggests that this range of data could include measures of labour demand, labour supply and past take up, as well as consultation with key stakeholders and businesses.

The purpose of the note is to set out how the Council’s Policy and Insight team have updated the employment land requirements forecasts in the Employment Land Review (2023) in order to align them with the period now covered by the Local Plan (2023 – 2040).

2. Scenarios

In the context of the above, the following scenarios have been considered within the Employment Land Review carried out by Lichfields:

- **Scenario 1:** baseline projections of employment growth (labour demand) within the main office and industrial sectors derived from a pre-Covid baseline economic forecast produced by nationally recognised experts Experian (as of March 2019)
- **Scenario 2:** baseline projections of employment growth (labour demand) within the main office and industrial sectors derived from the latest baseline economic forecast produced by Experian (March 2022);
- **Scenario 3:** a policy-on estimate of employment growth (labour demand) to reflect the wider economic impact of the International Advanced Manufacturing Park (IAMP) proposals set out in the South Tyneside Vision 2023, Economic Assessment 2022, Economic Recovery Plan 2020 and other key strategic documents.

This scenario builds upon the ‘policy neutral’ Experian baseline forecasts, which do not account for the direct or wider economic impacts of planned investment at the IAMP.

This scenario seeks to estimate the wider multiplier effects associated with the direct jobs to be supported at the IAMP.

On the basis that the analysis seeks to understand the implications in relation to demand for employment space, the analysis presented focuses exclusively on the supply chain impacts associated with the IAMP. This approach reflects the following key assumptions:

- That the changes in indirect (supply chain) employment captured via a Type I multiplier are likely to be the key determinant of future demand for employment space in the Borough. Indirect jobs are likely to be focussed in businesses including (but not limited to) part manufacturers and logistics/distribution businesses, as well as various business services; and
- That the changes in induced employment captured via a Type II multiplier will have little bearing on the demand for employment space in the Borough. Induced employment effects will principally be observed in the service sector, as a result of increased wage spending in the economy.
- **Scenario 4:** estimates of local labour supply growth based on demographic assumptions applied to South Tyneside’s Standard Method local housing need figure of 321 dwellings per annum (dpa);
- **Scenario 5:** consideration of past (net) take-up rates of employment space in South Tyneside, based upon data collected by LSH (Net take-up figures have been calculated by subtracting losses of employment space from gross take-up data)

It should be noted that the final decision regarding the level of need that the Borough should plan for is not purely quantitative. There are various qualitative factors (as set out in other sections of this report) that should be taken into account alongside the modelled scenarios. These factors, which have been identified through an analysis of economic and

market conditions – as well as consultation with economic stakeholders, commercial agents and local businesses – will influence the employment space requirements that need to be planned for.

3. Analysing employment change and converting to net land requirement

Using the scenarios above, Lichfield's economic modelling produced the following predicted outcomes for future employment change in South Tyneside between 2021 and 2039:

Table 7.1 Forecast employment change in South Tyneside (by scenario) 2021-2039

Type of Space/Use Class	Scenario 1: Baseline LD (Pre-Covid)	Scenario 2: Baseline LD (Latest Data)	Scenario 3: Policy-On LD	Scenario 4: LS (321 dpa – Standard Method)	Scenario 5: Past (Net) Completions
Office E(g)(i)/(ii)	680	1,070	1,620	1,545	N/A
Light Industrial E(g)(iii)	0	335	945	535	N/A
General Industrial B2	-1,215	-945	-445	-810	N/A
Distribution B8	375	445	680	645	N/A
Total Employment Sectors	-155	910	2,805	1,915	N/A
Total All Sectors	2,600	3,600	5,495²⁰	6,380	N/A

Source: Experian / IAMP AAP background evidence / Lichfields analysis

Based on the Homes and Communities Agency employment densities 2015 guide (of 1 1 workforce job per 12.5sq.m for office, 1 workforce job per 47sq.m for light industrial, 1 workforce job per 37sq.m for general industrial and 1 workforce job per 65 sq.m for smaller scale warehousing and 1 workforce job per 71sq.m for medium scale and 1 job per 87.5sq.m for big box distribution), Lichfields were able to convert the employment forecasts into land requirements.

These were as follows and covered the period 2021 to 2039, i.e 18 years

Table 2: Net land requirement General Employment (hectares)

Scenario Option	Scenario 1: Baseline Labour Demand (Pre-Covid)	Scenario 2: Baseline Labour Demand (latest data)	Scenario 3: Policy-On Labour Demand	Scenario 4: Labour Supply	Scenario 5: Past (net) Completions
Land Required (net)	3.37	11.29	27.31	19.50	19.92

As the Local Plans sets out, It should be noted, however, that the figures contained within Table 1 relate to net land requirements. For general employment uses, the addition of a two year flexibility margin would see the range increase to between 9.65 ha and 33.59 ha as shown in Table 2. The range rises further – to between 20.22 ha and 44.16 ha – if historic losses are replaced at 25% of past trends.

Table 3: General Employment Requirements with safety margin and replacement of losses allowance added.

Scenario Option	Scenario 1: Baseline Labour Demand (Pre-Covid)	Scenario 2: Baseline Labour Demand (latest data)	Scenario 3: Policy- On Labour Demand	Scenario 4: Labour Supply	Scenario 5: Past (net) Completions
Land Required (net)	3.37	11.29	27.31	19.50	19.92
Indicative Gross Land Requirements by Scenario (safety margin only) (ha)	9.65	17.57	33.59	25.78	26.20
Indicative Gross Land Requirement by Scenario (safety margin and replacement of losses) (ha)	20.22	28.14	44.16	36.35	36.77

4. Converting the analysis into the appropriate time frame

In order to ensure the above analysis applied to the new plan period of 2023 to 2040 (i.e 17 years rather than 18) the Policy & Insight team in the Council took each output, divided it by 18 (to give an average for a year) and multiplied by 17 to apply that average over the new time period. This provides updated scenarios as follows:

Table 4: Net land requirement General Employment (hectares)

Scenario Option	Scenario 1: Baseline Labour Demand (Pre-Covid)	Scenario 2: Baseline Labour Demand (latest data)	Scenario 3: Policy-On Labour Demand	Scenario 4: Labour Supply	Scenario 5: Past (net) Completions
Land Required (net) 2021-2038	3.37	11.29	27.31	19.50	19.92
Land Required (net) 2023-2040	3.182778	10.66278	25.79278	18.41667	18.81333

Table 5: General Employment Requirements with safety margin and replacement of losses allowance added.

Scenario Option	Scenario 1: Baseline Labour Demand (Pre-Covid)	Scenario 2: Baseline Labour Demand (latest data)	Scenario 3: Policy-On Labour Demand	Scenario 4: Labour Supply	Scenario 5: Past (net) Completions
Land Required (net) 2021-2038	3.37	11.29	27.31	19.50	19.92
Land Required (net) 2023-2040	3.182778	10.66278	25.79278	18.41667	18.81333
Indicative Gross Land Requirements by Scenario (safety margin only) (ha) – 2021-2038	9.65	17.57	33.59	25.78	26.20
Indicative Gross Land Requirements by Scenario (safety margin only) (ha) – 2023-2040	9.113889	16.59389	31.72389	24.34778	24.74444
Indicative Gross Land Requirement by Scenario (safety margin and replacement of losses) (ha) – 2021-38	20.22	28.14	44.16	36.35	36.77
Indicative Gross Land Requirement by Scenario (safety margin and replacement of	19.09667	26.57667	41.70667	34.33056	34.72722

losses) (ha) – 2023- 2040

5. Summary

The Employment Land Review does not make any recommendation as to which scenario should be planned for but makes clear that it is a policy decision and that it is also a policy decision as to whether to add an allowance for a safety margin and replacement of losses to the net land requirement. For the reasons set out in the Employment Land Technical Paper, the Council's preferred scenario is Scenario 3: Policy-On Labour Demand and an allowance for a safety margin and a replacement of losses has been added. Table 3 summaries the resulting 'headline' figures for each scenario. The 'headline' figure of 41.70 ha is the figure which has informed the Local Plan.

Table 3: Summary figures

Scenario Option	Scenario 1: Baseline Labour Demand (Pre-Covid)	Scenario 2: Baseline Labour Demand (latest data)	Scenario 3: Policy-On Labour Demand	Scenario 4: Labour Supply	Scenario 5: Past (net) Completions
Overall land requirement	19.09	26.57	41.70	34.33	34.73

Appendix 2: Council response to Employment Land Review assessment of sites

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
GENERAL EMPLOYMENT								
E26		n/a	Ashworth Frazer Industrial Estate	2.30	n/a	Vacant and dilapidated industrial complex adjoining metro line at Hebburn. Pasquill lease expires in 2023. Redevelopment proposals unlikely whilst rent being received. Planning application for redevelopment of site to accommodate 100 housing units. Council resolution to grant planning consent for residential development.	Substantial costs to demolish buildings, most of which are at end of economic life. Redevelopment for employment uses would not be viable given location, anticipated values and high abnormal costs. Council to allocate for residential.	Site has planning permission for residential. De-allocate
E20		n/a	Former Hawthorne Leslie Shipyard, Ellison Street, Hebburn	3.70	n/a	Large vacant and derelict shipyard. The fabrication halls and most other buildings have been demolished but one remains in southern corner. Site has been marketed over long period (Knight Frank & GVA). Council resolution to grant planning consent for residential development.	Substantial investment required to bring site back into use. Area of low market demand, good supply of riverside sites. Council to allocate for residential.	Site has planning permission for residential. De-allocate
E1		ED.6	Land at Wagonway	0.5	Wagonway Industrial	Sports field in centre of industrial estate is owned	A suitable site on an established industrial	The plot is not currently available and therefore has not been identified

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
			Industrial Estate, Hebburn		Estate, Hebburn	by football club, but not laid out as pitch. Owner unwilling to sell.	estate which has attracted interest from businesses; but as the owner is unwilling to sell or develop, the site is not available. .	as part of the available employment supply. However, it is part of a well-established and successful industrial estate. The Council therefore considers that it would be incongruous to identify it as white land as the intentions of the owner may change and it is included in the Wagonway Industrial Estate allocation.
E21		n/a	Green Business Park, Hebburn/Jarrow Staithes	1.71	n/a	Gas holder within industrial area dismantled in 2017. Close to the former Dow Chemical works site. Site available for re-use. The site has been sold but no planning application for a change of use had been received at the time of this study.	Given the complexity and cost of bringing forward this site for employment use the site is not regarded as deliverable. The Council should consider showing it as "white land" in the Local Plan. Future use is realistically limited to enabling a modest extension of the warehousing and storage use to the west or use ancillary to the Viking Energy Centre. Not deliverable.	De-allocate

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
E22			Former Dow Chemicals, Ellison Street (Rohm & Haas)	12.15		Large riverside works, that closed in 2015. Most buildings cleared to slab. but office block, gatehouse and weighbridge have been retained. The site was in chemical industry use since 1950s and shipyard prior to that. High abnormal costs to remediate and remove foundations. On market with JK Property Consultants. Owner unwilling to consider alternative uses. WSP report identified that with interventions to remove constraints, the site has potential for wide range of offshore sector uses. The Council should retain for a range of employment uses and consider suitable infrastructure uses such as renewable energy generation.	Retain for employment. Council to consider allowing a range of uses including employment and energy generation.	Retain allocation
E3		ED.1	Land East of Pilgrims Way, Bedesway	0.43	Bede Industrial Estate	Undeveloped plot within established industrial estate. Owned by a developer - Northern Trust.	Council to consider retaining as employment land	Retain allocation

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
E4		ED.1	West of Pilgrims Way (east of Mitsumi), Bede Ind Est	1.41	Bede Industrial Estate	Grassed former expansion land to east of former Mitsumi now owned by Northern Trust. Company prepared to build or sell plots.	Council to consider retaining as employment land	Retain allocation
E27			West of Bedesway / Jarrow Road junction, Bede Ind Est	0.17	Bede Industrial Estate	Owned by Northern Trust. Building to west is let to AAP Metal Fabrications, but this land is not included in demise. The site is therefore unlikely to be expansion land.	Smaller than threshold site area of 0.25 ha. Council should consider as potential windfall site within an established employment area. We do not recommend that the site is allocated for employment.	Retain allocation as within an established industrial area but do not include in calculation of available employment land.
E5		ED.2	North of Tesco, Towers Place, Simonside Ind Est	1.31	Simonside Industrial Estate	Cleared industrial site within established industrial estate. Further reclamation required to grub up floor slabs. Owned by Council and currently on market.	Council to consider retaining as employment land	Retain allocation
E7		ED.3	South of Heddon Way, Middlefields Ind Est	0.68	Middlefields Industrial Estate	Land to the rear of industrial units. Access route needs to be identified. The site is not currently being marketed but there has been interest in acquiring it for employment development.	Council to consider retaining as employment land	Retain allocation

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
E28		ED.4	East of Feller UK, Middlefields Ind Est	0.29	Middlefields Industrial Estate	Expansion land for Feller UK. Not available to market.	We do not recommend that the site is identified as an available employment site.	Retain allocation as within an established industrial area but do not include in calculation of available employment land.
E29		n/a	Former Mayflower Glass, Boldon Lane	0.35	n/a	Old and vacant industrial unit being marketed as a development site. A former industrial building on the opposite side of Moor Lane was redeveloped for housing in 2019. There is a mix of industrial and commercial uses to the west. Planning consent granted for nine town houses in July 2020.	Council has granted planning consent for housing, thus site no longer available for employment purposes. Not available.	Do not allocate
E11			Land west of 16 Brooklands Way, Boldon Business Park	0.60	Boldon Business Park	Owned by UK Land Estates (developer / investor). Outline consent previously granted for development of detached industrial unit (ST/1601/08/OUT).	Council to consider retaining as employment land	Retain allocation
E12			Land East of Lukes Lane, Monkton Fell (West) Hebburn	3.33	Monkton Business Park	Grazing land. Knight Frank had marketed this and the adjoining site P1 for industrial use since March 2015. Site requires access and infrastructure provision so whilst in an	Council has granted planning consent for housing, thus site no longer available for employment purposes. Not available.	Do not allocate

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
						area where demand relatively strong, viability of development weak. potential for small unit or use for external storage.		
SPECIALIST – PORT OF TYNE								
E30		PR.1	Compound beside Jarrow Road	0.25	Port of Tyne	Fronting internal estate road, on southern edge of Tyne Dock estate.	Within Port Estate; Council to consider retaining as specialist employment land.	Retain as specialist employment land.
E16		PR.1	Tyne Dock Enterprise Park South (Dock infill)	3.50	Port of Tyne	Within Port of Tyne Estate. Filling of former dock basin (ST/0944/09/FUL) has created development land and mitigated flood risk.	Within Port Estate; Council to consider retaining as specialist employment land.	Retain as specialist employment land.
E17		PR.1	Hill 60	0.51	Port of Tyne	Land formerly used for aggregate storage on edge of Port Estate and fronting Templetown from which access could easily be taken.	Within Port Estate; Council to consider retaining as specialist employment land.	Retain as specialist employment land.
E19		PR.1	Tyne Dock Enterprise Park (former McNulty Offshore), Commercial Road	4.36	Port of Tyne	Purchased by Port of Tyne to allow a down-river extension of Port Estate. The site has Enterprise Zone status and adjoins the Council's Holborn Riverside Regeneration Area.	Within Port Estate; Council to consider retaining as specialist employment land.	Retain as specialist employment land.

[illegible]

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
M1		n/a	Argyle Street / Caledonian Street, Hebburn	6.80	n/a	Identified in SHLAA as deliverable, developable and achievable. Formerly proposed mixed use site. Development for economic development will have to be compatible with residential /educational surrounding uses and any residential / wildlife habitat areas developed/retained on site.	Council regard the site as ecologically sensitive. Not achievable.	The site at Argyle street is identified as unachievable in the SHLAA due to the biodiversity mitigation that would be required. Do not allocate
E9			Former Duncan House, Crossgate / Claypath Lane	0.29		Cleared site of office block. Planning consent for construction of seven units for B1/ B2 / B8 granted but not implemented. Council advise that a planning application for a drive-thru has still to be determined.	Council to consider allocating as a mixed use site, on which residential, commercial or employment premises could be developed.	The site is vacant brownfield site occupying a key gateway location when approaching the town centre. A number of different uses would be suitable in principle for the site. There is no reason to protect if for employment use
M3		SP13	Central Library, Anderson Street	0.32	Regeneration Improvement Area	Library has relocated but vacant building remains. Council has identified potential for student accommodation.	Council to consider allocation for mixed-use with nominal employment component.	The site forms part of the Fowler Street Improvement Area and has been earmarked for student accommodation.
M10			Laygate / Rekendyke Lane	0.11		Cleared site of small workshop at the northern end of larger employment area that has been	Smaller than threshold site area of 0.25 ha. Council should regard as windfall site suitable for	Below the 0.25 ha threshold for allocation. Do not allocate

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
						redeveloped for housing, workspace and public car park.	commercial, residential or employment use. We do not recommend that the site is allocated for employment.	
M5			Disused Gasholder, Oyston Street / Garden Lane	0.33	n/a	Disused gas holder in commercial area on edge of town centre. Adjoins supermarket, car parks and local industrial estate. Demolition proposed in Q3 2022. Following demolition further remediation may be required before the site could be redeveloped.	Council to consider allocation for commercial mixed-use	Northern Gas Networks own the site and are scheduled to demolish it. The Council's Regeneration team has advised that employment, retail, or car parking would be suitable in principle for the site. There is no reason to protect if for employment use
M6		SP7	Harton Quay	0.50	South Shields Riverside Regeneration Area	Regeneration of riverside coal staiths on edge of town centre. One plot taken up for bespoke office development. Remaining plot owned by South Tyneside Council which is considering a range of potential uses. Speculative office development is not currently being considered.	Council to consider allocation for mixed-use which could include offices.	Do not make an allowance for employment supply

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
M9			Holborn Regeneration Area - Commercial Road / North of Laygate Street	9.00	South Shields Riverside Regeneration Area	Commercial area within Holborn Riverside Regeneration Area, with Enterprise Zone status. Council promoting for office development. Remainder of regeneration area to be housing (Keepmoat). The site is a regeneration priority. In 2021 it received £1.85 million Brownfield Land Release funding. It has £9.4 m LEP funding for office development in EZ.	Council to consider allocation for office or other use compatible with Planning Use Class E, given the close proximity to residential premises.	Make an allowance for 0.69 ha of employment supply.
M11			Long row car park			Riverside car park, adjoining Sea Cadet building. Formerly used in association with offices. Offices have been converted to apartments and car park now unused, but has planning consent for housing.	Smaller than threshold site area of 0.25 ha. Council to regard as windfall housing site.	Do not allocate

Appendix 3: Potential Sites identified in the Employment Land Review

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
P9			Rear of T A Centre, Victoria Road West	0.95	n/a	Greenfield site currently used as paddock, between T A Centre and Metro line and adjoining Victoria Road Industrial Estate. Owned by Secretary of State for Defence. Access road from Victoria Road West. Neighbouring fire station site also surplus to requirements.	Council advise that site is safeguarded for new Metro station.	Do not allocate
P10		n/a	Priory Road, Jarrow	0.45		Triangular area of open space separating housing area from Priory Road and the industrial areas beyond. A boundary wall and belt of mature trees adds to its value as open space. Current access through residential area.	Council to retain as open space.	Do not allocate
P6		n/a	Rear of Shaftesbury Avenue, Tyne Point Ind Est	0.90	n/a	Grassed and wooded area on edge of industrial estate provides wide buffer for housing to south. The site is an allocated industrial estate. Part is designated open space and the remainder designated wildlife network. The Council own the eastern part. A rectangle of 0.50 ha to the	Small area of open space adjoining industrial estate. Council to consider allocating for employment if resistant to	The site is allocated as part of the Tyne Point Industrial Estate, but it forms a buffer between it and the adjoining residential estate, so it does not represent available supply.

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
						south of Be Modern is held in same title as their factory and is thus expansion land, which is not available to the market, unless declared surplus to their requirements.	release of land in Green Belt.	
P7		n/a	West of National Grid sub-station, Hartford Road	0.67	n/a	Adjoins National Grid Sub-station. Site crossed by UHV cables. Site within allocated employment area but designated wildlife network and open space. Screened from housing to west by wooded embankment. Title not registered.	Forms buffer between housing and sub-station, topography unsuitable for employment.	Do not allocate
P8		n/a	East of National Grid sub-station, Hartford Road	0.65	n/a	Crossed by pylons and UHV cables. Could accommodate storage compounds if screened from housing. Site within allocated employment area but designated wildlife network and open space. Title not registered	Poor access through housing area. Council to retain as low grade open space.	Do not allocate
P11			Laygate, South Shields	1.05		Site fronts Laygate and Commercial Road opposite the Holborn regeneration area. Western part Laid out as a parkland mound. Eastern part is cycleway through landscaped strip. The requirement for open space and traffic free routes will arguably increase once Holborn redeveloped as high density housing.	Council to retain as open space.	Do not allocate

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
P5			North West of Testo's Roundabout	22.88	n/a	A prominent level greenfield site with frontages to the A186 and A19. The delivery of this site requires highway improvements to enable access from main road network. Given the scale of this site the cost of providing infrastructure will be substantial. Owned by Church Commissioners the site is allocated as Green Belt but has been previously considered for development.	A very large site with substantial infrastructure costs that would compete with IAMP. Council to consider whether it is premature to allocate for employment.	The site could be considered as suitable, notwithstanding the concerns of National Highways. However, its southern boundary is adjacent to the A184 which means that it would not align with the boundary of the proposed housing allocation in the emerging Local Plan. For this reason, it is not considered appropriate to take it forward to allocation. Do not allocate.
P1			Land East of Monkton Burn, Hebburn	2.77	n/a	Grazing land. Knight Frank has been marketing with adjoining site for industrial use since March 2015. Site requires access and infrastructure provision so whilst in an area where demand relatively strong, viability of development weak. Lichfields have submitted application for housing development on this and land to the west.	Council to consider funding required to bring site forward for employment development.	The site is subject to extensive surface water flooding and it is unclear that it can be satisfactorily accessed. Do not allocate.
P2			Former Red Barns Garden Centre, West side of Mill Lane, Monkton	1.65		Land in Green Belt adjoining active quarry. Former owner had aspiration for B1/B2/B8 but sold to Ibstock Brick to enable extension of quarrying.	Quarrying activity incompatible with employment allocation at this stage.	Quarrying activity incompatible with employment allocation. Do not allocate.
P3			Opposite Monkton South Business Park, Hebburn	9.35	n/a	Farmland in Green Belt, prominently situated beside A194. Owner aspiration for B1/B2/B8. Owned by Laverick Hall Farm.	Council could consider allocating for employment as	It is not well related to existing development and is part of a landscape area which is predominantly open with long range views, part of a wildlife

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
							part of Green Belt review.	corridor, extends into an area which is open and green and contributes positively to the purposes of the Green Belt. Do not allocate.
P12			North West of White Mare Pool Roundabout	0.35	n/a	Small, fenced compound previously used for external storage. Adjoins slip road from A194 to roundabout, but access via road to north which runs behind Travelodge hotel. Site is screened by mature trees. Within Green Belt.	Council to consider allocating for small scale employment use.	Access is via a narrow road behind the Travel Lodge. It is unlikely to be suitable for employment use. Do not allocate.
P4a			Western part of former Wardley coal disposal point, Follingsby Lane, Wardley	3.65		Former coal handling depot in Green Belt which is separated from Follingsby Park by the disused Leamside railway line. Eastern part of site is a spoil heap which screens the remainder of the site. Current uses include container storage and anaerobic digester. Harworth Estates sold the site to Thomas Armstrong (Concrete Blocks) Ltd in 2020.	Council to consider allocating for employment as part of Green Belt review.	For the reasons set out in the Wardley Colliery section of this paper, it is considered that exceptional circumstances have been demonstrated to the removal of this land from the Green Belt and allocate it as land for economic development.
P4b			Eastern part of former Wardley Coal Disposal Point, Follingsby Lane, Wardley	1.66		Former coal handling depot in Green Belt which is separated from Follingsby Park by the disused Leamside railway line. Eastern part of site is a spoil heap which screens the remainder of the site. Current uses include container storage and anaerobic digester. Harworth Estates sold the site	Council to consider allocating for employment as part of Green Belt review.	For the reasons set out in the Wardley Colliery section of this paper, it is considered that exceptional circumstances have been demonstrated to the removal of this land from the Green Belt and allocate it as land for economic development.

ELR ref	SHLAA ref	Policy ref	Site	Size	Wider Potential Allocation	ELR comments	ELR recommendation	STC response
						to Thomas Armstrong (Concrete Blocks) Ltd in 2020.		
P4c			Northern part of former Wardley Coal Disposal Point, Follingsby Lane, Wardley	3.50		Former coal handling depot in Green Belt which is separated from Follingsby Park by the disused Leamside railway line. Eastern part of site is a spoil heap which screens the remainder of the site. Current uses include container storage and anaerobic digester. Harworth Estates sold the site to Thomas Armstrong (Concrete Blocks) Ltd in 2020. This plot was used for storage of excavated material from Tyne Tunnel 2.	The owner's planning consultant considers that this parcel of land would be suitable for development of employment premises. The Council advise that the land is allocated as a Local Wildlife Site within Green Belt and is unsuitable for employment use.	This site is within Wardley Colliery Local Wildlife Site and survey work in 2020 confirms priority habitats in this location. The allocation of this site for development would conflict with natural environment and biodiversity policies. Do not allocate.
P13			Mypetstop, Follingsby Lane, Wardley	2.34		Owner has submitted representations to Local Plan. Existing business detrimentally affected by change in access resulting from IAMP development. Owner wants to widen options for redevelopment of this brownfield site on the edge of the Green Belt. Site adjoins the eastern edge of IAMP; industrial development and restrictions on access could impact on future use of the site.	As previously developed land within but on the edge of the Green Belt and adjoining allocated employment land the Council should consider allocating for employment or other compatible use.	The Green Belt boundary was established through the IAMP Area Action Plan process. It was intended to remain permanent in the long term and the land that was released for a specific and exceptional purpose i.e. to meet existing and forecast economic development needs in relation to the advanced manufacturing and automotive sectors. It is not considered that there are exceptional circumstances to warrant amending the IAMP AAP boundary. Do not allocate.

Appendix 4: Other sites that have been considered

Site	Size (ha)	STC Assessment
Land at A&P Tyne	3.84	Within the A&P Tyne estate and in general industrial use. It is not an available site.
Land at A&P Tyne	0.86	Within the A&P Tyne estate and in general industrial use. It is not an available site.
Land at A&P Tyne	1.33	Within the A&P Tyne estate and in general industrial use. It is not an available site.
Land at Shell UK Oil Terminal	11.6	The land is already in active employment use so not available. Forms part of ED5.
Land at Palmer Street	0.33	The site forms part of a wider employment allocation but has a large number of mature trees. It is unlikely to be suitable for development.
Former Hebburn Library	0.06	The area has been subject to public realm improvements and now forms a pedestrianised route through to the new library and leisure centre. It is not available for employment use.
Land west of Bedesway/Jarrow Road Junction	0.24	The site provides visual amenity at junction. It is not suitable for development.
Open space (Priory Road)	1.1	The site provides recreational open space. The site also contributes to forming a green wildlife corridor alongside the River Don. This site provides a natural barrier between residential development and roads and railway line. It is not suitable for development.
Land at Elswick Way Industrial Estate	0.4	The site is in the ownership of Vic Young Ltd and the majority of the site is used for servicing vehicles. The northern end of the site is steeply banked and not developable. It is not an available site.
Large, grassed space (Colman Avenue)	2.4	The site provides an important open space linking to green wedges amongst industrial and residential development. It is not suitable for development.
Former B&Q, Millbank Industrial Estate, Secretan Way, South Shields	1.0	The site is in active use by Home Bargains for retail. It is not available for employment use.
Land at Commercial Road/Tudor Road	1.65	The site is in active use by a logistics company. It is not available.
Land at Laygate	0.2	The site is a public open space within an area of otherwise limited provision. The site is adjacent to Trinity Walk green space. It is part of the national cycle network and is currently being widened by the Council's Highways team for that purpose. It is not available for employment.
Land at Rekendyke Lane/Laygate	0.67	The site is cleared and in the Council's ownership. The Council's Regeneration Team have advised that flexibility needs to be retained for the site as there are a range of possible uses e.g. public realm improvements, open

		space, ecological mitigation, workshop units and residential. It is not therefore appropriate to protect it for employment development.
Land to rear of Western Approach Trade Park, Wilson Street	0.31	The site at Wilson Street was vacant for a few years after the redevelopment of the factory to the south-east but was granted consent for container storage (B8) on 2 December 2021 (ST/0939/21/FUL). The consent has been implemented