Bracknell Forest Council

Authority Monitoring Report 2014-15: Economy

Bracknell Forest Borough Local Planning Framework
www.bracknell-forest.gov.uk/planningpolicy
February 2016

Region

Appendices

1 Introduction

1.1 This report deals with economic issues and covers the period 1 April 2014 to 31 March 2015. It provides commentary up to December 2015 on whether or not the economic related policies in the adopted plans forming part of the Development Plan are being successfully implemented.

1.2 This document is divided into two parts. Section 2 'Context' provides background context, including national legislation, background and local policies, and Section 3 'Monitoring against the Development Plan' looks at the implementation of the development plan policies (relating to the economy).

1.3 This AMR should be read in conjunction with other topic based AMRs such as:

- Progress against the Local Development Scheme
- Duty to Co-operate
- Housing

2 Context

2.1 National Legislation and Policy

Localism Act

2.1 The Act came into effect in November 2011, and establishes the duty to co-operate in relation to the planning of sustainable development. It requires a Local Planning Authority (LPA) to engage constructively, actively and on an on-going basis in relation to the duty on strategic matters with other LPAs and designated bodies.

National Planning Policy Framework (NPPF)

2.2 The NPPF was published in March 2012. The document sets out the 'presumption in favour of sustainable development' and highlights the contribution that economic growth can make to this. The 'Core Principles' include the need to pro-actively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs (para. 17, bullet 3). This theme is developed further in the document under chapter 1 that covers 'building a strong, competitive economy'; chapter 2 'ensuring the vitality of town centres'; and chapter 3 'supporting a prosperous rural economy'.

2.3 Specifically, these sections include the following requirements:

- Paras. 20 and 21 require LPAs to plan pro-actively to meet the development needs of business to help achieve economic growth. This includes planning pro-actively to encourage sustainable economic growth, setting a clear economic vision and strategy, setting criteria or identifying strategic sites to meet business needs over the plan period, and, identifying priority areas for economic regeneration, infrastructure provision and environmental enhancement.
- Para. 22 states that the long term protection of sites allocated for employment use should be avoided where there is no prospect of a site being used for that purpose. It also makes it clear that applications for alternative uses of land or buildings should be treated on their merits having regard to the market and relative need for different land uses where there is no reasonable prospect of a site being used for the allocated employment use.
- In relation to retail development, para. 23 states that LPAs should define a network and hierarchy of centres, the extent of town centres and primary shopping areas, allocate suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres, and, plan positively for a town centre in decline.
- Para. 24 makes it clear that the sequential test should be applied to proposals for main town centre uses that are not in an existing centre and not in accordance with an up to date local plan. It states that town centre uses should be located in town centres, if such sites are not available edge of centre locations should be considered, then out of centre sites.
- In relation to the rural economy, para. 28 states that local plans should support the growth and expansion of all types of business and enterprise in rural areas; and support sustainable rural tourism and leisure developments.
- A further paragraph (para. 51) within the housing chapter makes reference to the need to normally approve planning applications for change to residential use and any associated

development from commercial buildings (currently in the B use classes) where there is an identified need for additional housing in that area, provided that there are not strong economic reasons why such development would not be appropriate.

2.4 In December 2015, the Government published a consultation on proposed changes to the NPPF. These include the possibility of changing planning policy to make clear that unviable or under used employment land should be released unless there is significant and compelling evidence to justify why such land should be retained for employment use. There is also a suggestion that this may be extended to unviable or underused retail, leisure and non residential institutional brownfield land.

2.5 Planning Practice Guidance (PPG) provides further detail on ensuring the vitality of town centres and the nature of the evidence base required for economic matters.

Changes to permitted development rights

2.6 In April 2015 the Government brought into force the Town and Planning (General Permitted Development)(England) Order 2015 which consolidated previous legislation on permitted development rights. The Order grants planning permission for different types of development, including changes of use, in specified circumstances.

2.7 Some new permitted development changes introduced by this Order and relevant to this Monitoring Report include:

- Allowing storage or distribution buildings (B8) to change to residential (C3) subject to prior approval and other size and usage limits;
- Allowing amusement arcades/centres and casinos to change to residential subject to prior approval and other limitations;
- Allowing change of use from shops (A1) to financial and professional services (A2);
- Allowing change of use from financial and professional services (A2), betting offices, payday loan shops and casinos to restaurants and cafes (A3) subject to prior approval and other limitations;
- Allowing change of use from shops (A1) and financial and professional services (A2) to assembly and leisure (D2) subject to prior approval and other limitations;
- Allowing retailers to erect click and collect facilities within their curtilage subject to size limitations;
- Making permanent time limited increased permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings.

2.8 The Government has also announced (in a press release [(1)] on October 2015) its intention to make permanent existing temporary permitted development rights for changes of use from offices to residential, subject to prior approval. It also intends to introduce new rights linked to allowing the demolition of office buildings and the building of new homes in their place. In

1 Thousands more homes to be developed in a planning shake up (13th October 2015)

addition, new permitted development rights will enable the change of use of light industrial buildings and laundrettes to new homes. Regulations to bring this change into force have not yet been made.

2.9 These permitted development changes are considered likely to have implications for the stock of retail and business premises in the Borough in future monitoring years. The degree to which these can be monitored will vary.

Budget 2015

2.10 Following the General Election, on 8th July 2015, the Chancellor presented a summer 2015 Budget. This was designed to "show the world the UK is open for business" and set out measures to encourage further growth and help businesses to grow and create jobs.

Fixing the Foundations: Creating a more prosperous nation

2.11 In July 2015, the Government published Fixing the Foundations which set out the Government's proposals for improving productivity. The proposals are focused around the two strands of 'encouraging long-term investment' and 'promoting a dynamic economy'. It includes measures to increase house building and home ownership, improve market competition and exports, and re balance the economy.

Autumn Statement 2015

2.12 The Autumn Statement was published by the Chancellor on 25 November 2015. The Statement sets further measures to help people get onto the housing ladder, greater control for local councils over the use of business rates, the introduction of an Apprenticeship Levy and extension of the small business rate relief scheme.

2.2 Development Plan and CIL

2.13 The Development Plan for the Borough contains a mixture of planning policy documents produced under the present and former planning systems. The determination of planning applications must be made in accordance with the Development Plan, unless material considerations indicate otherwise. The Development Plan for Bracknell Forest comprises:

'Saved' Policies of the Bracknell Forest Borough Local Plan (BFBLP)

2.14 The BFBLP was adopted in 2002. Certain policies of the BFBLP were 'saved' by the Secretary of State beyond September 2007. Since the Core Strategy and Site Allocations Local Plan documents have been adopted (see below), some of these policies have been superseded, but a number remain in force until such time as further Local Plans are produced.

Core Strategy (CS)

2.15 The CS was adopted in 2008. This is a high level document containing the Council's long-term aspirations for the Borough and policies to guide and manage development in Bracknell Forest until 2026. In relation to employment and retail development, the CS directs most employment development to the identified employment areas. The document also identifies a network of retail centres including Bracknell Town Centre, larger centres (at Sandhurst and Crowthorne) and smaller centres (village/ neighbourhood centres) across the Borough.

Site Allocations Local Plan (SALP)

2.16 The SALP was adopted in July 2013. It helps implement the adopted CS, mainly in terms of identifying sites for residential development. However, some policies affect employment and retail provision in the Borough, for example, through the inclusion of these uses within proposals relating to strategic sites, changes to the extent of identified employment areas and amendments of the boundaries of some retail areas. Some examples include changes to the defined boundary of Bracknell Town Centre to exclude the Peel Centre which now has a separate designation as an 'edge of centre' location (in accordance with new definitions introduced by the NPPF). Some employment areas and local neighbourhood centres have also been de-allocated.

South East Plan (SEP)

2.17 In March 2013 the majority of the SEP was revoked by the Secretary of State. The only policy which remains part of the Development Plan is NRM6 - this relates to the Thames Basin Heaths Special Protection Area (SPA). No economic related policies remain.

Community Infrastructure Levy (CIL)

2.18 The Council adopted CIL in April 2015 and commenced charging on 6th April 2015. CIL Charges apply to residential developments and to convenience based supermarkets and superstores and retail warehousing (net retailing space over 280m^2 gross internal floorspace).

2.3 Emerging Documents

2.19 Some documents are currently being produced, which will need to be monitored through future AMRs:

Comprehensive Local Plan (CLP)

2.20 The Council adopted a revised Local Development Scheme in June 2015 identifying the preparation of a single Local Plan. Work has commenced on the CLP evidence base and reviewing existing policies. The CLP will include economic and retail policies based on up to date evidence. They will be consistent with policies in the NPPF. The CLP is at an early stage of preparation, with an Issues & Options consultation planned from June/July 2016.

Neighbourhood Development Plans (NDPs)

2.21 Bracknell Forest is fully parished, and comprises six Parish and Town Councils (Binfield Parish, Bracknell Town, Crowthorne Parish, Sandhurst Town, Warfield Parish and Winkfield Parish).

2.22 Binfield Parish, Warfield Parish, Bracknell Town and Winkfield Parish (2015) have been designated as 'neighbourhood areas' for the purposes of neighbourhood planning. Sandhurst Town has applied for designation and consultation responses are being considered. With the exception of Binfield (see below), the Plans are at an early stage and it is not known what the format of the NDPs will be or whether or not they will contain economic related policies. Progress on the preparation of these NDPs and applications for the designation of any other neighbourhood areas, can be viewed on the Council's website (www.bracknell-forest.gov.uk/neighbourhoodplanning) and will be reported in future AMRs.

2.23 Binfield Neighbourhood Plan was subject to independent examination in November/December 2015 and will be subject to Referendum in March 2016. The most relevant policy to economic development is Policy CO1 - High Speed Broadband. Other policies will also be relevant in considering development proposals including those on transport, community facilities, the environment and built form. The Binfield Neighbourhood Plan can be viewed at www.bracknell-forest.gov.uk/binfieldparishneighbourhoodarea.

2.4 Other Monitoring Information/ Background Evidence

2.24 The Council has produced a range of information which is relevant to the consideration of the economy (some of which is referred to in this AMR or contained in the AMR appendices). Evidence based studies referred to below can be viewed at http://www.bracknell-forest.gov.uk/evidencebaseforcomprehensivelocalplan. There are also a number of strategies produced by other bodies which are relevant. These are detailed below.

Planning Commitments for Employment Uses

2.25 The employment commitments document is published on an annual basis. It provides an overview of new permissions, sites under construction and completions during each monitoring year. It relates to retail uses, 'BIDS' (business, industrial, distribution and storage) uses and other employment related development.

2.26 The latest report covers the period 1st April 2014 to 31st March 2015 and is available to view on the Council's website at http://www.bracknell-forest.gov.uk/monitoringeconomyandemployment.

Employment Land Review

2.27 An Employment Land Review (ELR) was undertaken in 2009 by consultants (Roger Tym and Partners/Vail Williams). It looked at future requirements for employment floorspace in the Borough up to 2026, and assessed each of the principal employment areas. At that time, the supply of office floorspace was considered to be in excess of requirements. There was evidence of some need for further industrial/warehousing floorspace and it was considered that the development of strategic sites might present opportunities for accommodating this need. Generally, existing employment floorspace was considered to be high quality, well serviced, accessible and fit for purpose.

2.28 The ELR assessment of the employment areas in the Borough helped inform decisions made in the Site Allocations Local Plan (SALP) in terms of which existing employment areas/ uses should be safeguarded and which might be appropriate for redevelopment for other uses (e.g. housing). The ELR will be replaced by an Economic Development Needs Assessment. This will cover the Central Berkshire Functional Economic Market Area and is likely to be completed in June 2016.

Market Perspective of Bracknell Forest Borough Office Floorspace

2.29 In 2011, the Council commissioned consultants Hicks Baker to undertake a review of the office market in the Borough. This updated some of the assessments within the 2009 Employment Land Review.

2.30 The Study noted that there had been a general reduction in the take up of office floorspace in the Borough since 2007, and an increase in availability (i.e. the amount of vacant floorspace). The vast majority of available floorspace in the Borough was in Bracknell Town, but this reflected the relative size of the office stock when compared with Winkfield, Ascot, Binfield, Sandhurst and Crowthorne. Based on the take-up rates at the time, the amount of vacant office space represented around 8 years' supply. The quality of office stock in the Borough was described as generally good.

2.31 The report recognised that the Core Strategy target for office space provision to 2026 was likely to be met or exceeded by 2016. Further, it was thought that there would be a trend towards reduced office demand and take-up, given that floorspace requirements per person were expected to be lower than previously assumed. This was as a result of, for example, increased home working, hot-desking, and cloud-based computing provision.

Bracknell Functional Economic Area Study, 2015

2.32 In 2015, the Council commissioned consultants NLP to undertake work to identify the relevant functional economic area within which Bracknell Forest is located. Subsequent to this, a wider Berkshire Functional Economic Market Area (FEMA) Study was commissioned by the Local Enterprise Partnership and all six Berkshire Authorities. This identified Bracknell Forest as falling within a Central Berkshire FEMA with Reading Borough, Wokingham Borough and the Royal Borough of Windsor and Maidenhead.

Berkshire Economic Development Needs Assessment (EDNA)

2.33 The Local Enterprise Partnership and Berkshire Authorities have also jointly commissioned Berkshire Economic Development Needs Assessments for the three FEMAs identified across Berkshire, which are based on the findings of the Berkshire FEMA. The central Berkshire EDNA will cover Bracknell Forest. As a result the EDNA is being done on this basis. It will look at the quantity and quality of floorspace currently available and will assess the amount of land/floorspace required for 'B' uses up to 2036. The study is due to be completed in June 2016.

Retail Study

2.34 The Retail Study (2008) reviewed the projected catchment areas of the main retail centres in the Borough (as identified at the time in the BFBLP - some of these have subsequently been amended by the SALP) and suggested remedies for any identified shortfalls in the existing retail offer of the Borough. The Study concluded that, on the whole, Bracknell was not performing as well as rival centres, meaning that it did not meet the needs of its residents who consequently tended to travel to more distant centres for their retail offer. Since publication of the retail study, the redevelopment of Bracknell Town Centre has commenced with the Lexicon, being due to open in 2017.

2.35 The 2008 Retail Study will be replaced by a new Retail and Commercial Leisure Study which has been commissioned by Bracknell Forest Council, Wokingham Borough Council, Reading Borough Council and West Berkshire Council. It will focus on the main town centre uses (excluding offices).

'Good Growth for Cities' Report

2.36 This report is published annually and uses a number of indicators (including skills, income, health, and environment) to rank cities according to their economic well-being. In 2015, Reading and Bracknell were together identified as the highest ranking 'city' in the UK, when considering factors such as income levels, unemployment, the ratio of house prices to earnings, commute times and skill levels.

2.5 Links with Other Strategies

The Council Plan 2015 - 2019

2.37 The Council Plan sets out the priorities for the Council over the next four years. It is based on six strategic themes, each of which is linked to key measures of success and performance indicators. Most relevant to this document is the theme 'A strong and resilient economy'. This includes measures to ensure that the Borough is regarded as an excellent business location; has a thriving town centre supported by coordinated town centre management; local residents with high levels of employment and incomes and has businesses that are supported and encouraged to play an active role in the community. The Council Plan can be viewed at http://www.bracknell-forest.gov.uk/councilplan.

Economic Development Strategy

2.38 The Bracknell Forest Partnership has produced an Economic Development Strategy called 'Working Together for Sustainable Economic Prosperity', which covers the period 2011-2014. The Strategy aims to sustain and enhance the Borough's economy and sets out an action plan for achieving this. The actions include, for example, creating an 'Enterprise Hub' within the Town Centre to provide flexible accommodation for local people to meet and grow new business ideas, improving links between schools and businesses to identify the local skill needed, and providing a mix of types and tenures of housing to support the needs of residents, such as senior executives and families, in order to attract and retain workers. The Economic Development Strategy is in the process of being reviewed.

Local Enterprise Partnership (LEP)

2.39 LEPs are partnerships between local authorities and businesses that were created to replace the Regional Development Agencies. The Thames Valley Berkshire LEP was created in 2010 and brings together those representing education, employment and skills, small and medium sized enterprises, local authorities and the community sector. The LEP seeks to deliver economic prosperity in the Thames Valley in the next 20-30 years including deciding what the priorities should be for investment in jobs and infrastructure.

2.40 The Thames Valley Berkshire LEP has produced a strategy for the area (Delivering National Growth Locally - Strategic Economic Plan 2015/16 - 2020/21: March 2014). The overarching priority is to secure better access to talented people and bright ideas. The plan proposes six main objectives to achieve this, including: ensuring that economic potential is not constrained by labour supply issues; effectively commercialising and growing knowledge within the LEP area; and making towns in Thames Valley Berkshire genuine hubs in the ideas economy.

2.41 The document estimates that implementation of the Strategic Economic Plan will deliver an uplift of around £700m in the overall wages and profits generated through Thames Valley Berkshire's businesses; and by 2020, the Strategy estimates Gross Value Added (GVA) will be some £32.4bn (£700m higher than the baseline projection for 2020 of £31.7bn). (All based on constant, 2009, prices).

2.42 The LEP has also produced an Implementation Plan which explains how the LEP intend to achieve the objectives and realise the vision set out in the Strategy. By its nature, the Implementation Plan is a live document and a live process. It will be used to inform Thames Valley Berkshire LEP's work and will be refreshed regularly.

3 Monitoring against the Development Plan

3.1 Overview and Summary of Economy Indicators

3.1 There are two types of indicator against which the policies in the Development Plan are monitored: contextual and output.

3.2 Contextual indicators are indirectly related to the policies: they are aimed at providing a better understanding of the wider environment (economic, environmental and demographic).

3.3 Output indicators are measures of the quantifiable, physical activities that are related to implementation of the policies. Although the Government no longer specifies which indicators should be included, they continue to be used in the preparation of this monitoring report because they are still relevant to Bracknell Forest and because it means that the data is consistent and can be compared over time. Some ‘local’ indicators have been added to the former government (‘core’) ones, which specifically relate to monitoring the Core Strategy and Bracknell Forest Borough Local Plan policies and objectives, or the local impact of government policy (e.g. amendments to permitted development rights).

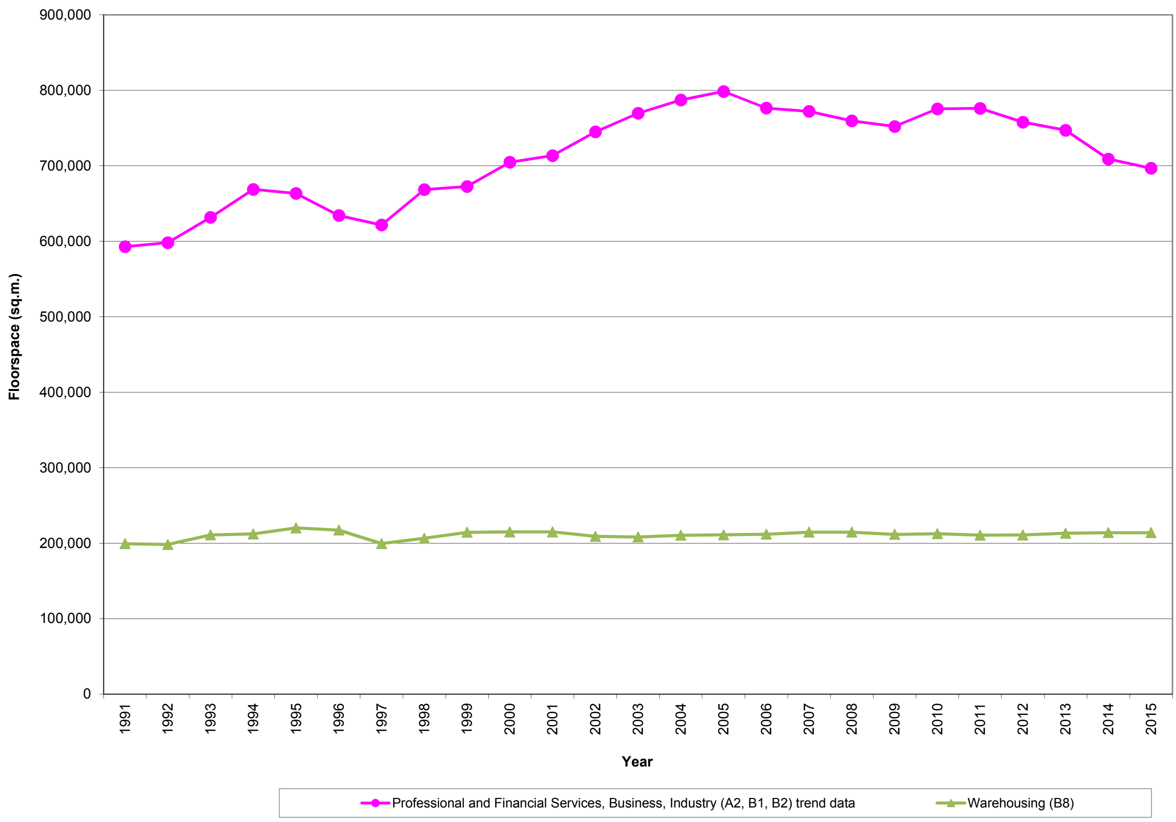
3.4 For the purposes of this report, indicators that refer to 'employment' measure floorspace falling within Use Class B1, B2 and B8.

3.2 Indicators

Contextual Indicators

Indicator: Con BD1 - Employment Floorspace Stock

Employment floorspace stock



Source: *Planning Commitments for Employment Uses, BCC 1991-98, JSPU 1998-2010, BFC 2010-2015*

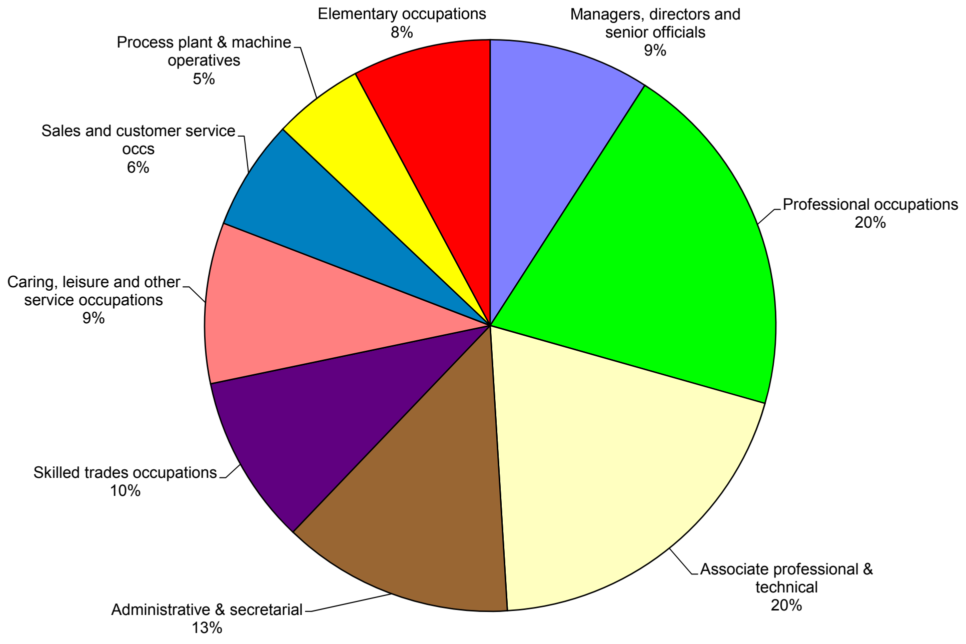
3.5 The current total employment floorspace stock (Use Classes A2, B1 and B2) for the Borough at 31st March 2015 was 696,691 m^2. This is just under a 2% decrease on last year's stock and continues the decline since 2011. Conversions from offices to residential in Bracknell Town Centre and the redevelopment of offices for residential development in Binfield contributed to the loss of employment floorspace seen in 2014/15.

3.6 For warehousing (Use Class B8) the floorspace stock was 213,928 m^2, a small increase of 50 m^2 on the previous year. The total stock of B8 floorspace has almost returned to the peak levels seen in 2007 and 2008.

3.7 There is potential for further net loss of employment floorspace (Use Classes A2, B1, B2 and B8) in the Borough in the future. At 31st March 2015 -19,902m^2 net of floorspace had outstanding planning permission. The greatest losses are in B1 floorspace, this is largely made up of outstanding permissions in Bracknell Town Centre (which will result in a net loss of about 30,000 m^2 B1) and at TRL in Crowthorne which will result in a net loss of about 40,000 m^2. Potential gains of B1 floorspace contributing to the amount outstanding include 10,775m^2 for Dell Computers at Cain Road, Amen Corner and 27,127m^2 for Hewlett Packard at Moor Lane, Amen Corner.

Indicator: Con BD4 - Distribution of Employment by occupation

Distribution of employment by occupation



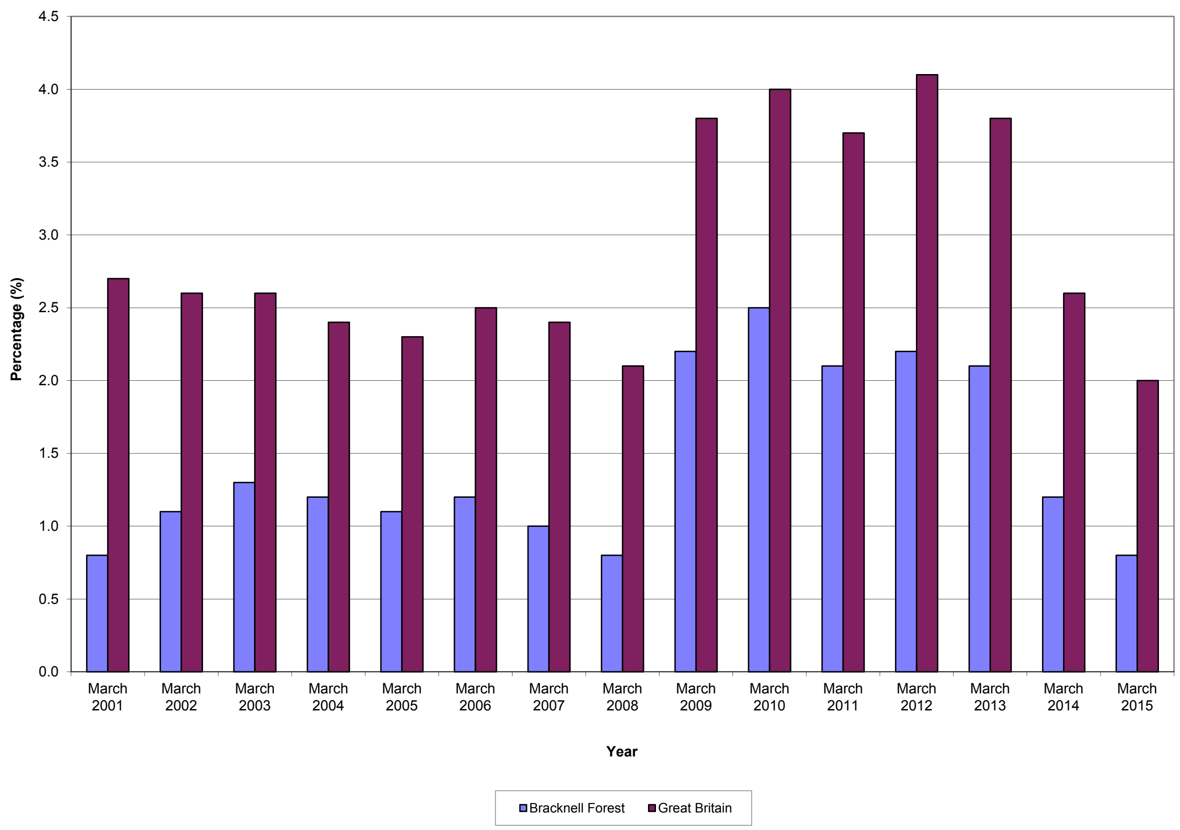
Source: *ONS Annual Population Survey (Employment by Occupation) (March 2015) http://www.nomisweb.co.uk Labour Market Profile*

3.8 No significant changes have taken place since last year and over the longer term the changes have reflected the national trend of increases in employment in the service sector and a reduction in employment in the manufacturing sector. The biggest change in employment sectors in the last year have been a 3% increase in employment in the 'associate professional and technical' occupations and a 3% decrease in the 'administrative and secretarial' occupations.

3.9 At 31st March 2015 the majority of employment in the Borough was in the service sector. The largest employment sector by occupation are 'professional occupations' and 'associate professional and technical occupations'.

Indicator: Con BD5 - Unemployment benefit claimants

Unemployment benefit claimants (Job Seekers Allowance Claimants)

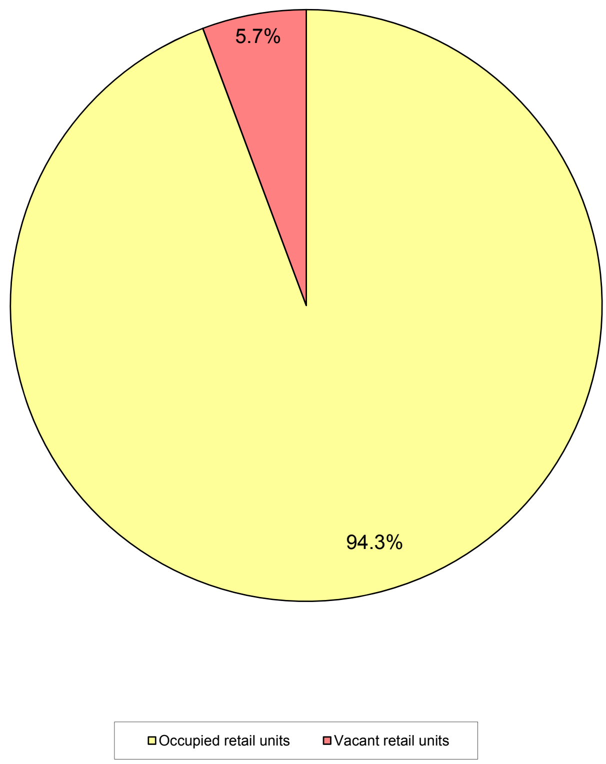


Source: *National Statistics; Nomis - Claimant Count Reports 2001–2015* *http://www.nomisweb.co.uk*

3.10 The proportion of working age residents in the Borough claiming Job Seeker's Allowance (JSA) has continued to reduce in this monitoring year falling from 1.2% in 2014 to 0.8%. This equals the lowest unemployment claimant count since 2001, and is also significantly below the average for Great Britain. The reduction in residents claiming JSA is likely to be the result of growth in the wider economy that took place in the monitoring year.

Indicator: Con BD6 - Percentage of vacant retail units across all designated retail centres in the Borough

Percentage of vacant retail units across all designated retail centres in the Borough



Source: *BFC Retail Survey, October 2015 (see Appendix 1 Retail Survey Data)*

3.11 The graph above reflects the position at October 2015, when the Council undertook its annual survey of the defined retail centres in the Borough. These are:

- Bracknell Town Centre (including the Peel Centre);
- Crowthorne centre;
- Sandhurst centre;
- All other district and neighbourhood centres listed in BFBLP Policy E5, (as amended by SALP Policy SA13 and associated Appendix 8).

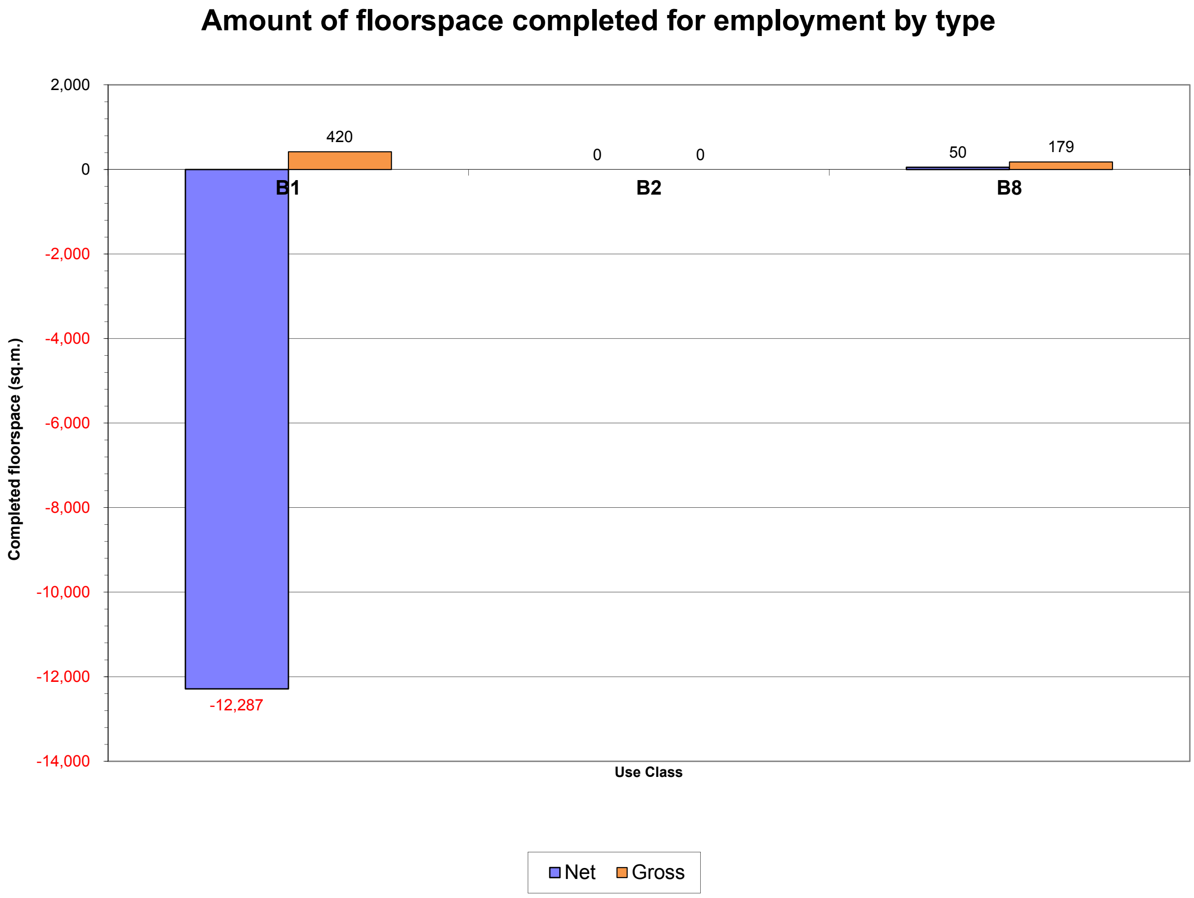
3.12 Vacancy rates in the Borough's defined centres have decreased from 9.1% in 2013/14 to 5.7% in the current monitoring year. Vacancy rates in Bracknell Town Centre have reduced from 14.7% to 6.8% in the current monitoring year. This change in vacancy rate in Bracknell Town Centre needs to be set against the reduced number of units (132 this year compared to 150 in 2013/14) due to the current redevelopment process. As with previous monitoring years, units that were demolished/ boarded up as part of the regeneration, were excluded from the survey - so the vacancy rate is based on a smaller number of units.

3.13 There are three centres experiencing higher vacancy rates, Crown Wood, Forest Park and Binfield. The latter has increased from a vacancy rate of 0% in 2013/14 to 25% in 2014/15. The percentage vacant in the smaller centres is distorted by the fact that there are fewer units than in the larger centres. Therefore, a small number of vacant units has the potential to represent a high proportion of the total.

3.14 Overall, 15 of the 24 designated retail centres throughout the Borough had no vacant retail units in October 2015. (N.B. Non-retail units are classified as those not falling within A1 - A5 or Sui Generis use). (See Appendix 1).

Output Indicators

Indicator: Amount of floorspace completed for employment by type (formerly Cor BD1)



Source: *Planning Commitments for Employment Uses, BFC, March 2015*

Core Strategy Target

The target that no one employment floorspace type is to form 100% of all employment floorspace completed in the monitoring year has been met.

3.15 The amount of completed BIDS floorspace in the Borough in 2014/15 resulted in a significant overall net loss, primarily due to loss of office (B1) floorspace.

3.16 Of particular note was the loss of a light industrial unit in Winkfield to residential use (loss of 2,300m^2), conversion of Ringside in Bracknell Town Centre to residential (prior approval - loss of 3,500m^2) and the demolition of Farley Hall, Binfield (loss of 4,460m^2).

3.17 In May 2013 the Government expanded the scope of permitted development rights, to include the change of use from offices to residential (subject to a prior notification procedure relating to highways, flooding and contaminated land). This change has already had some impact on floorspace in the Borough, and it is likely that this trend will continue as the Government has announced that it intends to make this permitted change of use permanent. The Council can monitor the majority of these changes of use through the Prior Notification procedure, although the principle itself cannot be contested.

Indicator: Amount of floorspace completed for employment by type in defined employment and regeneration areas (formerly Cor BD1b)

Amount of floorspace completed for employment by type in defined employment and regeneration areas

Table 3.1 Amount of floorspace completed for employment by type in employment and regeneration areas

Employment Area	Offices, Research & Development, Light Industrial B1 (Gross)	Offices, Research & Development, Light Industrial B1 (Net)	General Industry B2 (Gross)	General Industry B2 (Net)	Warehousing B8 (Gross)	Warehousing B8 (Net)
Bracknell Town Centre	0	-4,754	0	0	0	0
Western Industrial Area	0	0	0	0	179	179
Amen Corner	0	0	0	0	0	0

Employment Area	Offices, Research & Development, Light Industrial B1 (Gross)	Offices, Research & Development, Light Industrial B1 (Net)	General Industry B2 (Gross)	General Industry B2 (Net)	Warehousing B8 (Gross)	Warehousing B8 (Net)
Arlington Square	0	0	0	0	0	0
Southern Industrial Area	0	0	0	0	0	0
Eastern Industrial Area	0	0	0	0	0	0
Vulcan Way Industrial Estate	0	0	0	0	0	0
Total in employmnet & regeneration areas	0	-4,754	0	0	179	179
Rest of Bracknell Forest	420	-7,533	0	0	0	-129
Overall Total	420	-12,287	0	0	179	50

Source: *Planning Commitments for Employment Uses, BFC, March 2015*

The Core Strategy Target

The target that 60% of all employment types developed to be located in employment and regeneration areas, has not been met.

3.18 The graph and table show the distribution of gains and losses in different types of employment floorspace around the Borough's main employment areas and the rest of the Borough. Taking gross floorspace figures, all B1 completed floorspace was outside employment and regeneration areas. However, this only amounted to 420m^2 on two different sites (Jealotts Hill, Warfield and Wokingham Road, Bracknell. All B8 floorspace was on one site (Easthampstead Road, Bracknell) in an employment area.

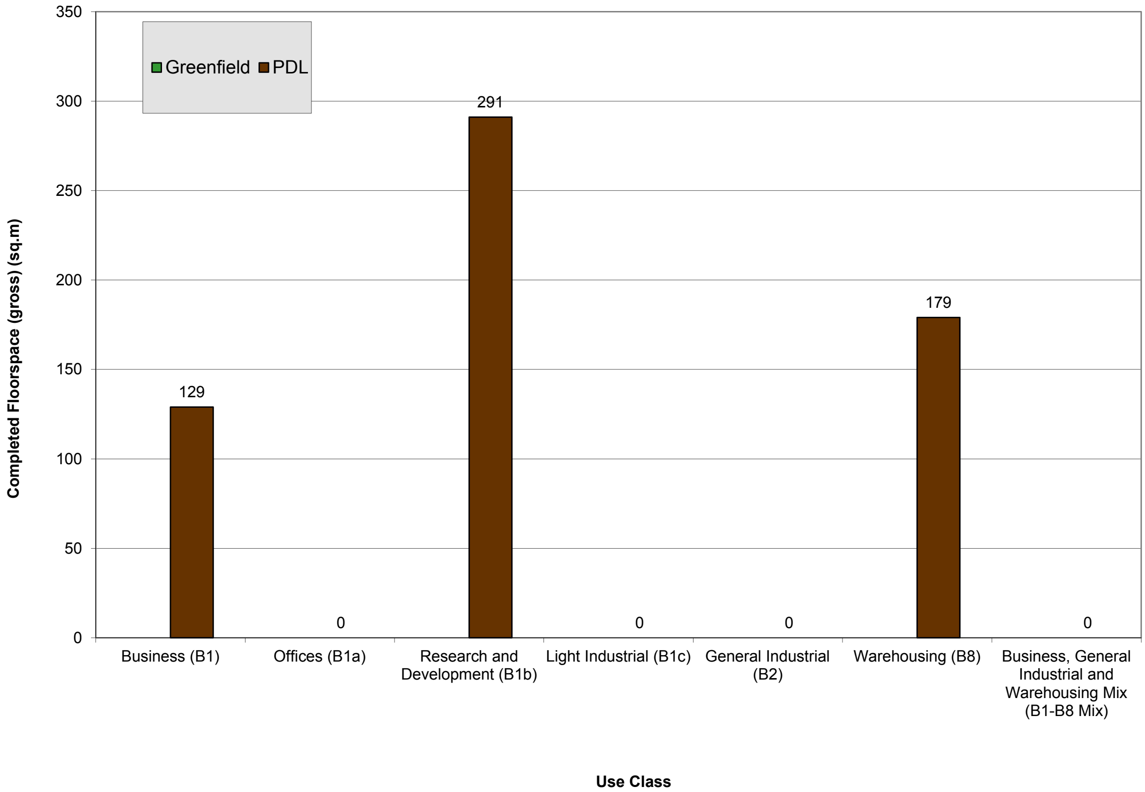
Indicator: Total amount of completed employment floorspace (gross) on Previously Developed Land by employment type 2014 -15 (formerly Cor BD2)

Table 3.2 Completed floorspace (gross) on PDL, by employment type.

Type	Greenfield (m^2)	%	Previously Developed Land (m^2)	%
Business (B1)	0	-	129	100
Offices (B1a)	0	-	0	-
Research and Development (B1b)	0	-	291	100
Light Industrial (B1c)	0	-	0	-
General Industrial (B2)	0	-	0	-

Type	Greenfield (m^2)	%	Previously Developed Land (m^2)	%
Warehousing (B8)	0	-	179	100
Business, General Industrial and Warehousing (B1-B8 Mix)	0	-	0	-
Total	**0**	**-**	**599**	**100**

Completed employment floorspace (gross) on PDL, by employment type



Source: *Planning Commitments for Employment Uses, BFC, March 2015*

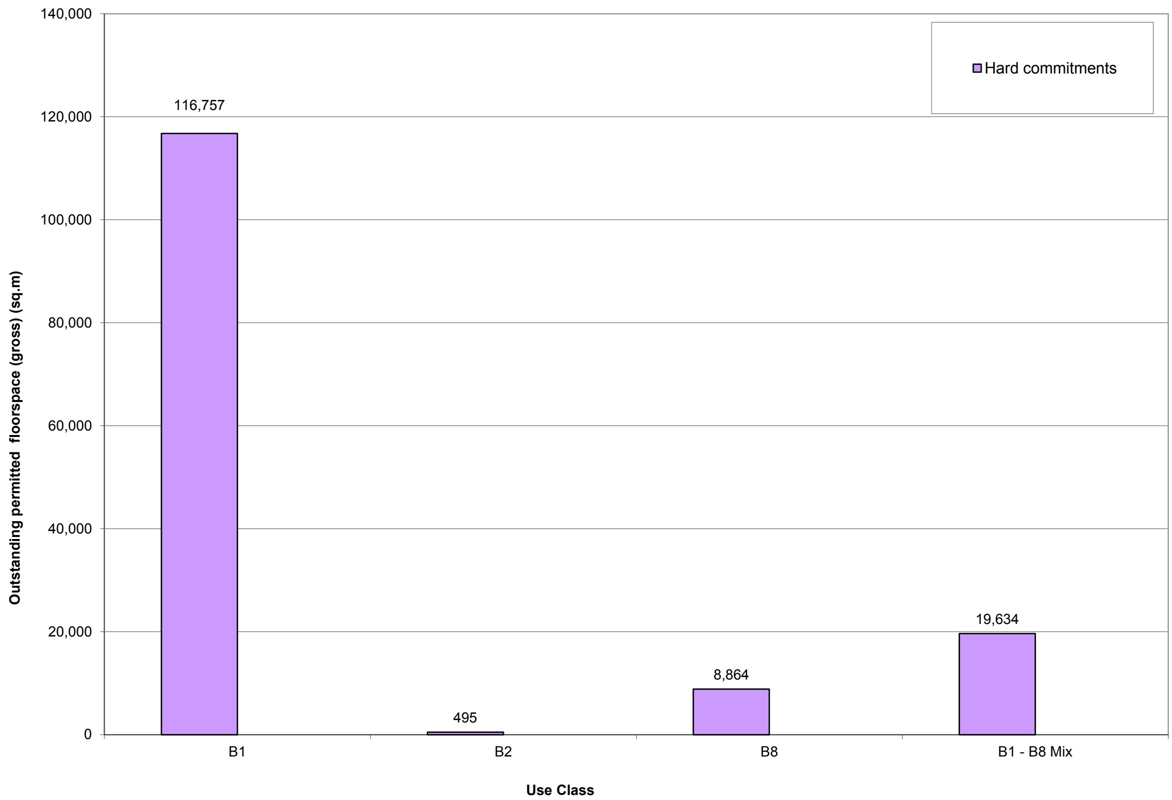
Core Strategy Target

The target of achieving 60% of completed floorspace by employment type on PDL has been met as no development has been completed on greenfield land.

3.19 The table and graph above show that all developments (across all BIDS employment types) in the monitoring year were on PDL; there were no developments completed on greenfield sites. Outstanding permissions indicate that this trend is likely to continue as the majority of proposals involve the redevelopment of existing sites.

Indicator: Employment land available by type - outstanding permissions (gross) (formerly Cor BD3)

Employment land by type - outstanding permissions (gross)



Source: *Planning Commitments for Employment Uses, BFC, March 2015*

Core Strategy Target

The target suggesting that all types of employment land and planning commitments should not fall below 100,000m^2/10 ha (gross) has been met.

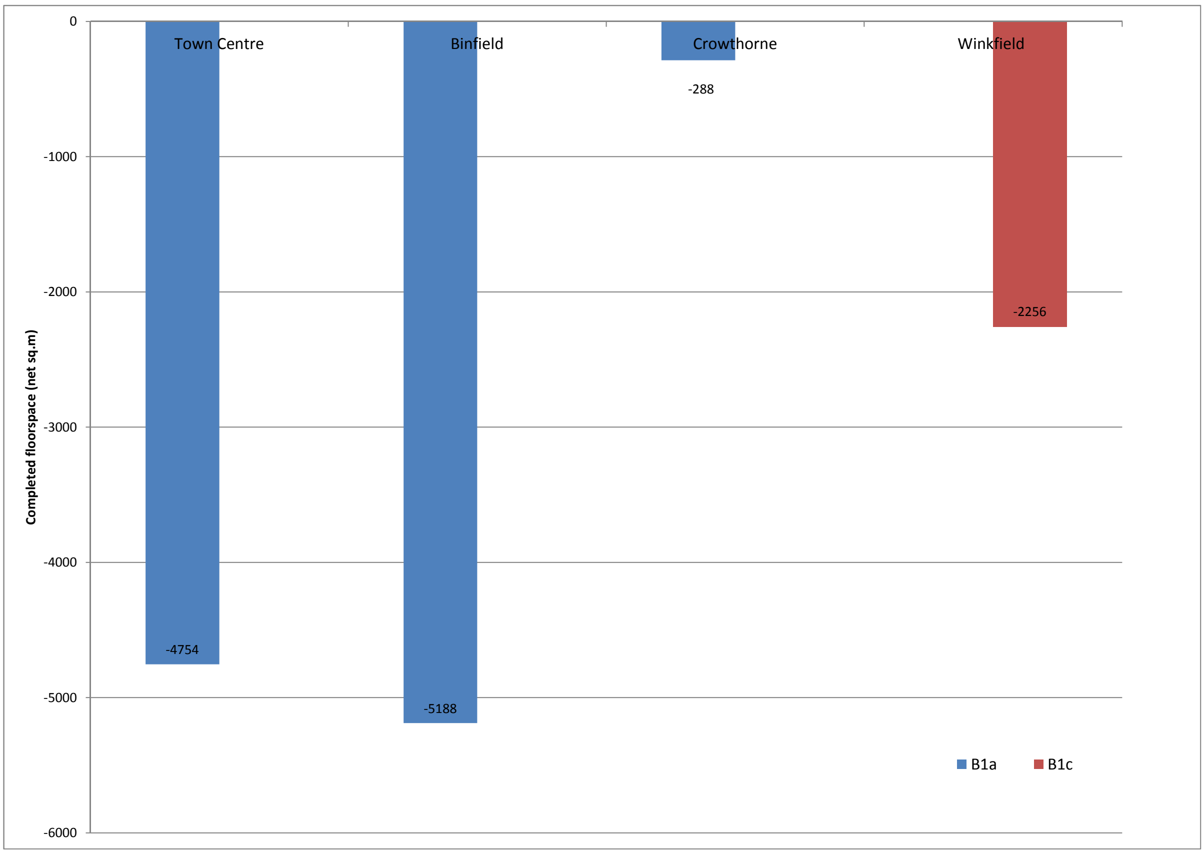
3.20 This indicator relates to outstanding permissions for employment development, and assesses whether or not the supply is sufficient to offer a degree of flexibility and choice in the interests of economic prosperity. The total amount of BIDS floorspace subject to hard commitments (i.e. developments with planning permission) is 145,750m^2 (gross). The majority of this figure is for B1 use and relate to sites at Amen Corner (40,346m^2) and on the Southern Employment Area (32,839m^2).

3.21 There are no soft commitments, (subject to S106 agreements) that involve a gain in BIDS floorspace. All soft commitments result in the loss of BIDS floorspace, and are primarily concerned with conversion to residential, for example, the conversion of Station House, Market Street, Bracknell (-5,709m^2 B1).

3.22 As far as soft commitments involving sites allocated in an adopted Local Plan are concerned, there are a number of employment sites that were allocated for residential development as part of the SALP (e.g. parts of the Eastern Employment Area, Bracknell). This was in response to the reduced demand for this type of floorspace and the need to allocate sustainable sites for residential and mixed use development. This will reduce the stock of employment floorspace in the Borough as these sites are developed. At the same time there are also some allocated sites that include proposals for employment development such as at Amen Corner South.

Local Indicator: Amount of employment floorspace lost to residential development

Amount of employment floorspace lost to residential use by location



Source: *Planning Commitments for Employment Uses, BFC, March 2015*

Core Strategy Target

Amount of employment floorspace / land lost to residential development should be less than 10,000m^2 or 1ha.
This target has not been met.

3.23 The target above relates to completed floorspace. A total of -12,486m^2 has been lost to residential (C3) use. A third of this was in Bracknell Town Centre and was due to the conversion of Ringside, 79 High Street (prior approval), and part of Enid Wood House, High Street (-4,754m^2). Another significant loss occurred as a result of the demolition of offices at Farley Hall, London Road, Binfield (-4,460m^2). This site was allocated for residential purposes through the SALP.

3.24 Further non-BIDS losses were;

- C2 (Care Home) loss in Crowthorne (-400m^2)
- D1 (Pupil Referral Unit) loss in the Rest of Bracknell (-311m^2).

3.25 Prior approvals are beginning to have a significant impact on the loss of employment floorspace to residential uses. In 2014/15 prior approvals accounted for a loss of -3,674m^2 employment floorspace to residential (Enid Wood House, Bracknell & 208/210 Dukes Ride, Crowthorne), or just over 42%. This trend is likely to continue.

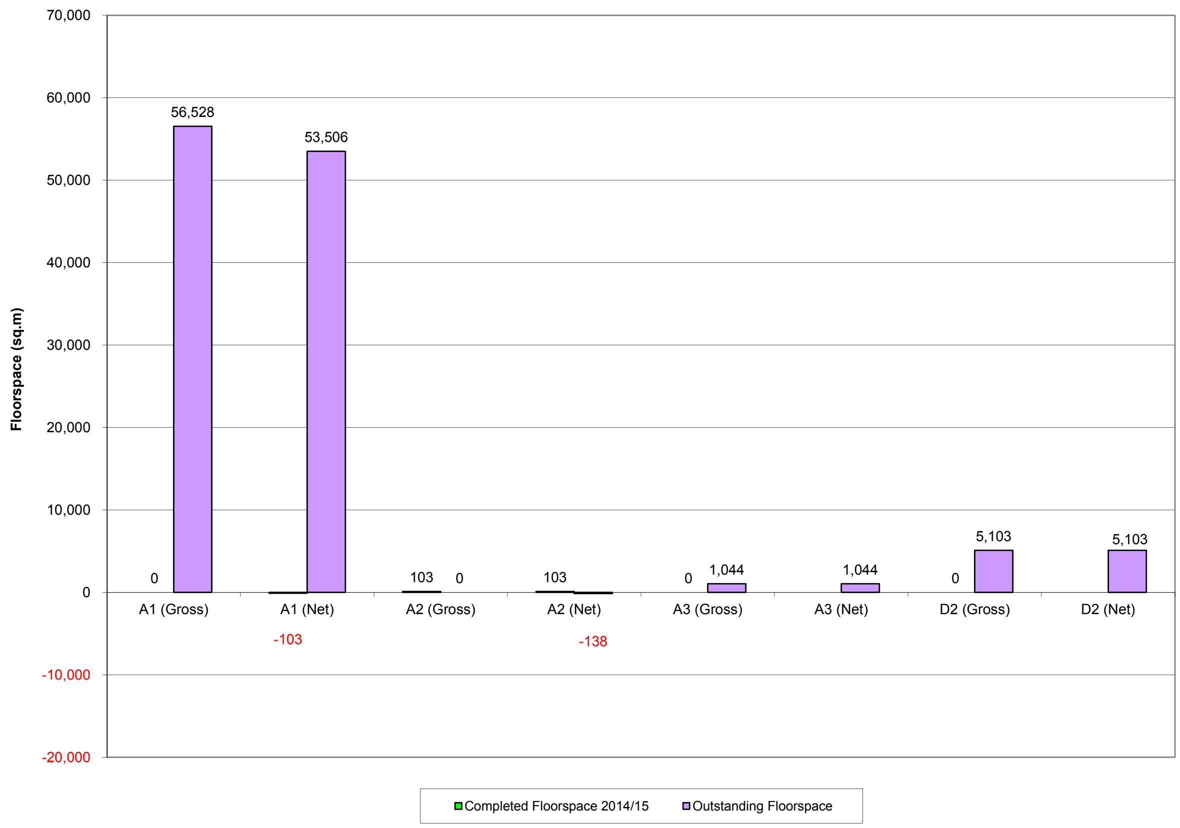
3.26 On the basis of the results of the Employment Land Review (2009) and the priority need for housing, the SALP de-allocated a number of employment sites. In addition to the above, further potential losses of floorspace are reflected in the figures for outstanding hard and soft commitments. For example, future losses of B1 and B8 floorspace at TRL, Nine Mile Ride, Crowthorne are recorded in the hard commitments and future losses of B1 and B8 floorspace on the remaining part of Land at Old Bracknell Lane, West Bracknell are recorded in the soft commitments.

3.27 As a result, it is unlikely that this target will be met over the next couple of years, particularly if land values continue to favour residential over employment uses.

3.28 As part of the evidence base for the Comprehensive Local Plan, an Economic Development Needs Assessment has been commissioned. This will re-assess the Boroughs need for BIDS floorspace to 2036.

Indicator Loc BD1: Amount of completed and outstanding retail and leisure development in Bracknell Town Centre (formerly Cor BD4)

Amount of completed and outstanding retail and leisure development in Bracknell Town Centre



***Source:** Planning Commitments for Employment Uses, BFC, March 2015*

Core Strategy Target

Amount of completed and outstanding retail floorspace, to be at least 56,000m^2 (gross) by 2011. Maintenance of, and no reduction in, the existing levels of leisure floorspace. These targets have been met.

3.29 The target above relates to completed and outstanding floorspace in the period to 2011. This period has passed and the target was met.

3.30 In the monitoring year, there was a minimal change in completed A1 and A2 floorspace (as seen in the graph above). The outstanding permissions are primarily accounted for by the reserved matters permission for the regeneration of Bracknell Town Centre. The 'outstanding' figure for A1 retail also includes the consented scheme at Princess Square which is currently under construction.

3.31 It should be noted that the SALP changed the boundaries of the Town Centre so as to exclude the Peel Centre (in line with definitions set out in the NPPF). The Peel Centre is now identified as an edge-of-centre location, where proposals are considered against the sequential test: this involves looking at whether a use can be located in Bracknell Town Centre before considering the Peel Centre as a possible location. The intended effect is to focus retail development in the Town Centre. This has affected the recording of permissions and completions in the Town Centre since 2013/14 and onwards.

Progress on Bracknell Town Centre Regeneration

3.32 The regeneration is progressing and remains a key objective for the Council. In October 2013 reserved matters (13/00433/REM) was granted for an amendment to the consented scheme for the regeneration of Bracknell Town Centre. This permission reduced the total amount of office and leisure uses but increased the proposed provision of retail floorspace. Demolition work commenced in respect of the Northern Quarter in September 2013. Foundation work started in late April 2015 and steelwork started in June 2015. The new centre called 'The Lexicon' is due to open in 2017. The regeneration of Charles Square has also commenced (June 2015). The existing square will be transformed into a new shopping street.

3.33 The time period for submitting reserved matters relating to the Bracknell Town Centre main outline permission expired in December 2014. Therefore, floorspace originally consented under the outline permission that did not come forward as reserved matters before this date, has lapsed. This amounted to just over 21,000m^2 B1 floorspace and just under 11,000m^2 of A1/A2 floorspace. The future of remaining sites is being discussed.

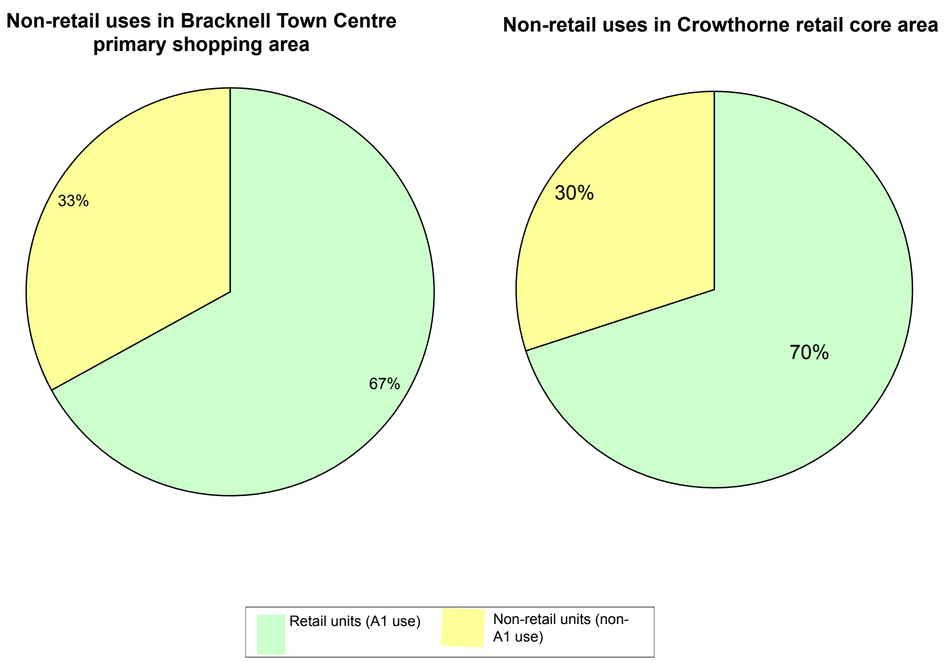
3.34 The main completions in the Town Centre within the monitoring year (resulting in a loss of B1), were in the form of changes of use to residential. There was also one change of use from A1 to A2. This related to Unit 3 on the ground floor of Gowring House (the majority of the remaining floorspace in this building is currently being converted to flats).

3.35 Further, at 31st March 2015 an extension to Princess Square was under construction which will create some 1,500m^2 of new retail floorspace.

3.36 There is also a 'soft' commitment for the conversion of Station House, Market Street to residential which if implemented will result in a net loss of -5,700m^2.

Indicator: Percentage of non-retail uses (of any class) in defined frontages of Bracknell Town Centre primary shopping area, and Crowthorne retail core area (BFBLP 'saved' Policy E9)

Amount of Non-Retail floorspace in Bracknell Town centre Primary Retail Area and Crowthorne Core Retail Area



***Source:** Retail Survey data, BFC, October 2015*

BFBLP Target

Non-retail uses (of any class) should not occupy more than 22% of defined frontage area within Bracknell town centre primary shopping area, or 44% of the defined frontage area within the retail core area of Crowthorne ('saved' policy E9).
The target has not been met for Bracknell Town Centre, but has been met for Crowthorne.

3.37 In October 2015, non-retail uses accounted for 33% of the defined frontage area within Bracknell Town Centre primary shopping area, and 30% of the defined frontage within the retail core area of Crowthorne.

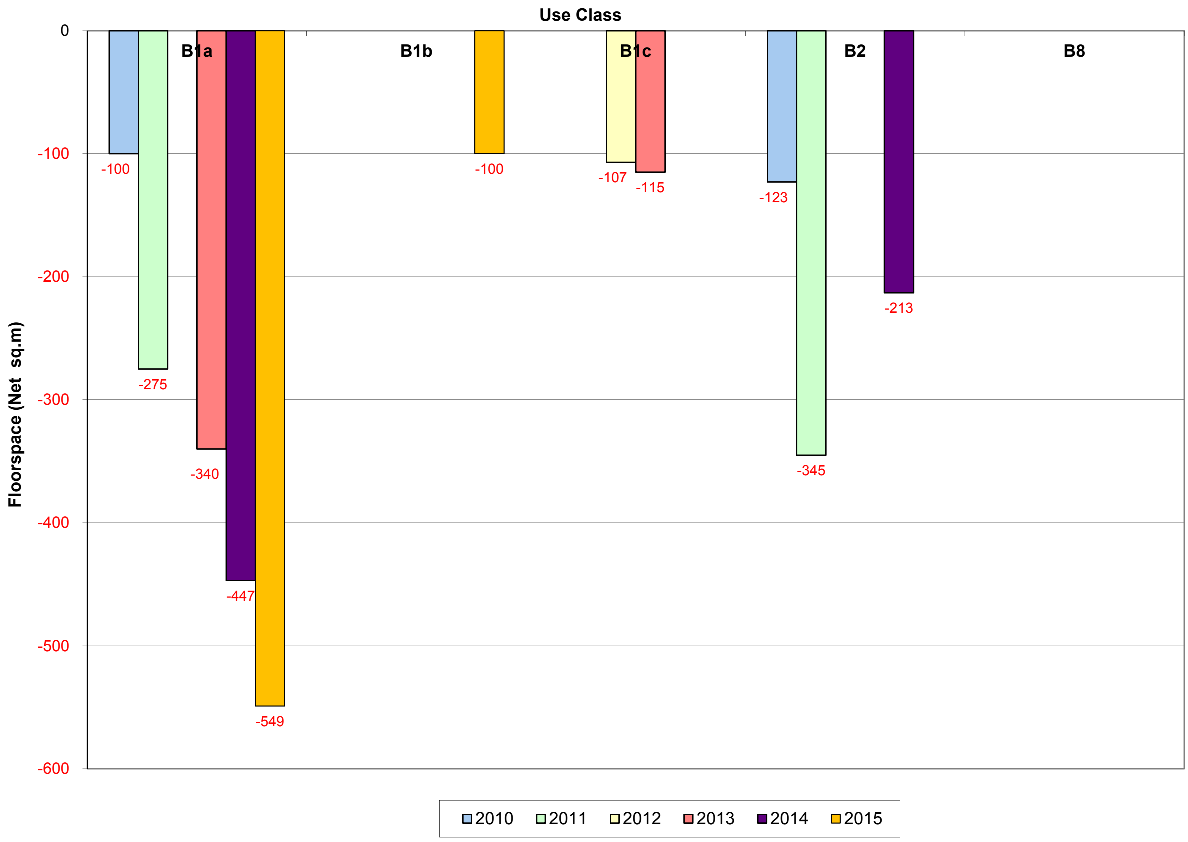
3.38 Therefore, the target has not been met for Bracknell Town Centre. This suggests that 'saved' Bracknell Forest Borough Local Plan (BFBLP) Policy E9 has not been effective. This needs to been seen in the context of Government policy aimed at introducing reater flexibility in the use classes to allow increased changes of use to occur without the need for planning permission. It is therefore recommended that BFBLP Policy E9 be reviewed as part of the preparation of the Comprehensive Local Plan.

3.39 Please note in accordance with para. 3.78 of the BFBLP, for the purposes of this policy, non-retail uses are classified as those falling outside the A1 use class.

3.40 The results of the retail survey for each centre are summarised in Appendix 1.

Indicator: Amount of floorspace (net) lost through loss of small business units (<500 sq.m) in BIDS (B1-B8) use

Loss of BIDS floorspace through business units (<500sq.m) since 2010



Source: *Planning Commitments for Employment Uses, BFC, March 2015*

Core Strategy Target

Policy CS19 - small business units (500 sq.m or less) will be protected. Target: No loss of small business units.
This target has not been met.

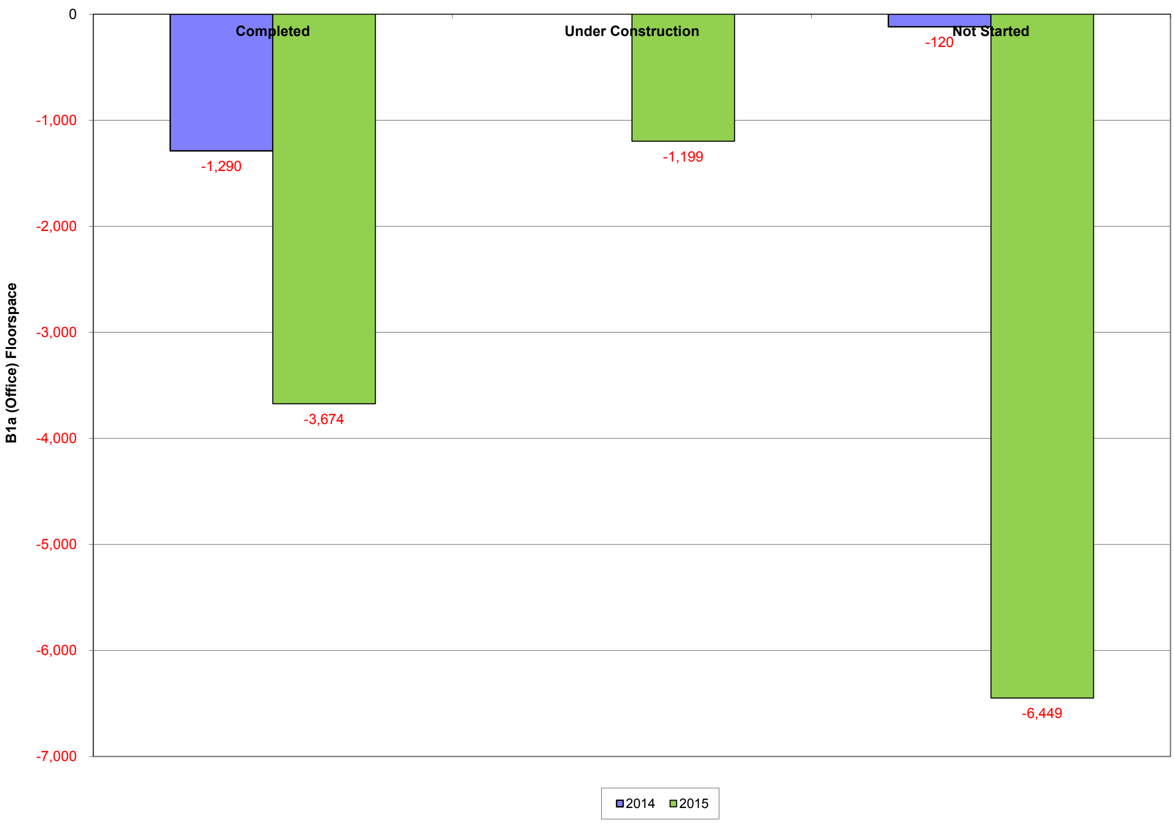
3.41 The target above relates to completed floorspace.

3.42 In the monitoring year 2014/15, five permissions were completed which resulted in the loss of small business units in the Borough - the majority of these involved losses of B1a office floorspace. In Crowthorne there were two developments resulting in a loss to residential. A further loss occured through conversion to residential in Binfield. In Sandhurst there was a loss of -121m^2 to a physiotherapy centre, and in Warfield extensions to a barn at Syngenta were demolished.

3.43 The trend data shows that losses have fluctuated over the last 5 years, with the monitoring year 2014/15 showing a slight improvement on last year. It is anticipated that the loss of small business units in B1a office use will continue, as a result of land values favouring redevelopment to higher value uses and through the change in permitted development rights (prior approval consent).

Indicator: Amount of B1(a) office floorspace (net) lost to residential development through prior approval consent (PAC) permissions

Amount of office floorspace being lost to residential through Prior Approval (net sq.m).



Source: *Planning Commitments for Employment Uses, BFC, March 2015*

No target. This indicator monitors the impact of the change in permitted development rights allowing the conversion of offices (B1a) to residential (C3 dwellings).

3.44 The indicator above relates to completed floorspace in the monitoring year 2014-15. For information, proposals that are under construction and not started are also shown.

3.45 The graph shows that two developments were completed in the monitoring year which resulted in the loss of -3,674 m^2 of offices to residential.

3.46 In parts of Bracknell Forest within the zones of influence of the Thames Basin Heaths Special Protection Areas (SPA), it is necessary for the developer to enter into a S106 Agreement before any conversion from offices can commence. As such, several prior approvals were counted as soft commitments in the monitoring year 2014/15, since the S106 Agreements had not been completed. These are not shown on the graph. -8,140 m^2 of office floorspace falls under this category, the majority of this (-5,709m^2) is in Bracknell Town Centre (Station House, Market Street).

Indicator: Amount of BIDS (B1-B8) floorspace lost to non-BIDS uses

Table 3.3 Table showing loss of BIDS floorspace to non-BIDS uses - completed floorspace (net)

Area Site Code	Existing Land Use & Use Class	Proposed Land Use & Use Class	B1a	B1b	B1c	B2	B8	D1	D2	Total
Bracknell Town Centre	Office B1a	Residential C3	-1,200							**-1,200**
Bracknell Town Centre	Office B1a	Residential C3	-3,554							**-3,554**
Western Industrial Area	Office B1a	Leisure D2	**(1)**						1,378	**1,378**
Binfield	Office B1a	Residential C3	-4,460							**-4,460**
Binfield	Office B1a	Residential C3	-588							**-588**
Binfield	Office B1a	Residential C3	-140							**-140**
Crowthorne	Office B1a	Residential C3	-120							**-120**
Crowthorne	Office B1a	Residential C3	-168							**-168**
Sandhurst	Office B1a	Physiotherapy Centre D1	-121					121		**0**
Winkfield	Light industrial B1c	Residential C3			-2,256					**-2,256**
Total			**-10,351**	**0**	**-2,256**	**0**	**0**	**121**	**1,378**	**-11,108**

1. This loss was counted in 2013-14

Source: *Planning Commitments for Employment Uses, BFC, March 2015*

No target. This indicator monitors the loss of BIDS floorspace (net completions) to other non-BIDS uses.

3.47 The table shows that overall losses of BIDS totalled -11,108m^2 in 2014/15, about 4,000m^2 less than the year before. These losses were primarily from B1 (a) office use to residential use (C3), although other uses included the change of use from offices (B1a) to leisure use (D2) and to a physiotherapy centre (D1).

3.48 Permissions relating to the Bracknell Town Centre regeneration scheme have been excluded from the above table, since this element is covered by other indicators and part of the redevelopment includes some new B1 floorspace. Other permissions in Bracknell Town Centre are included if they do not relate to the regeneration scheme.

Appendices

Appendix 1: Retail Survey Data

Bracknell Forest Retail Survey Summary (October 2015)

2015	A1	A2	A3	A4	A5	Sui Gen	Non-Retail	Total Retail Units	Vacant retail units	% Retail Vacancy
Binfield	8	2	2	0	2	2	5	16	4	25.0%
Birch Hill	5	1	0	1	1	0	2	8	0	0.0%
Bracknell Town Centre	82	21	11	2	6	10	8	132	9	6.8%
Bullbrook	6	0	0	0	1	0	1	7	0	0.0%
College Town (Yorktown Rd)	11	4	1	1	3	0	0	20	2	10.0%
Crown Wood	3	1	0	1	0	0	2	5	1	20.0%
Crowthorne	53	15	8	2	3	4	6	85	5	5.9%
Crowthorne (Station)	18	0	1	0	0	2	0	21	1	4.8%
Easthampstead	7	2	1	0	3	1	1	14	0	0.0%
Forest Park	2	0	0	1	2	0	2	5	1	20.0%
Great Hollands	8	1	3	1	1	0	4	14	1	7.1%
Hanworth	1	0	0	1	0	0	0	2	0	0.0%
Harmans Water	5	2	1	1	3	1	3	13	1	7.7%
Martins Heron	3	0	0	0	0	0	1	3	0	0.0%
N Ascot (Fernbank Rd)	3	0	1	0	1	0	1	5	0	0.0%
N Ascot (Warren Row)	4	0	0	0	1	0	1	5	0	0.0%
Peel Centre	12	0	0	0	0	0	0	12	0	0.0%
Priestwood	3	1	1	0	2	1	0	8	0	0.0%
Sandhurst (Central)	19	3	1	2	5	2	0	32	0	0.0%
Sandhurst (E Swan Lane)	3	1	1	0	1	0	1	6	0	0.0%
Sandhurst (Old Mills)	5	1	2	0	1	0	1	9	0	0.0%
Whitegrove	4	1	0	0	0	0	4	5	0	0.0%
Wildridings	4	0	1	0	2	1	3	8	0	0.0%
Yeovil Rd (Owlsmoor)	5	0	0	0	0	0	3	5	0	0.0%
TOTALS	274	56	35	13	38	24	49	440	25	5.7

TOTAL RETAIL UNITS ACROSS ALL CENTRES	440	
VACANCY ACROSS ALL CENTRES	5.7	%

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Nepali

यस प्रचारको सक्षेपं वा सार निचोड चाहिं दिइने छ ठूलो अक्षरमा, ब्रेल वा क्यासेट सून्नको लागी । अरु भाषाको नक्कल पनि हासिल गर्न सकिने छ । कृपया सम्पर्क गनूहोला ०१३४४ ३५२००० ।

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