

# **Birmingham Development Plan 2031**

## **Site Delivery Plan**

**October 2014**

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## 1. Overview

This Site Delivery Plan (SDP) has been produced to demonstrate that the overall levels of development set out in the Birmingham Development Plan (BDP) are achievable and that the overall spatial strategy can be realised.

Through the Examination in Public, the BDP has to meet the soundness tests. A plan is considered 'sound' if it is positively prepared, justified, effective and consistent with national policy. To be considered effective, the plan should be "deliverable over its period" (NPPF para 182). The SDP will help to demonstrate this, particularly to show how the Growth Areas will develop over time and how infrastructure can help support development.

The SDP covers the following:

- Identifies the overall levels of growth that the BDP is aiming to deliver
- Gives an overview of the considerations which have a key influence over the delivery of sites in Birmingham, including development viability and infrastructure
- An assessment of delivery for identified development sites
- Actions that will be undertaken / are underway to enable site delivery

A key part of the SDP is the assessment of delivery of large scale development sites. Principally it is focussed on housing, employment, retail and office development. The sites assessed are based on the evidence underpinning the BDP, including the Strategic Housing Land Availability Assessment (SHLAA). It also links into other key parts of the evidence base, including the Infrastructure Delivery Plan (IDP).

These large sites make a significant contribution to meeting the overall levels of growth identified in the BDP, with the remaining growth addressed through smaller sites, sites under construction and sites already delivered. The development capacity figures in this study relate to large sites only, and will therefore not necessarily total with figures in the policies of the BDP.

Overall the assessment presents a clear understanding of delivery issues in the City and highlights what is needed to bring sites forward for development. The study was updated in October 2014 to take account of the SHLAA 2014 and IDP 2014, with only minor changes made to the rest of the SDP.

## 2. Overall Levels of Growth for Birmingham

The overall approach of the Birmingham Development Plan (BDP) is to support the continued renaissance of Birmingham which will see the City Council plan for significant new development to meet the needs of its growing population and ensure that it builds a prosperous economy for the future.

Over the period 2011 to 2031 the BDP sets the following levels of growth within Birmingham's administrative boundary to support its growing population, and the ongoing strengthening and diversification of its economy:

- 51,100 additional dwellings;
- Two Regional Investment sites of 20 and 25 hectares and a 80 hectare employment site at Peddimore;
- A minimum five year reservoir of 96 hectares of land for employment use;
- About 350,000 sq. m gross of comparison retail floorspace by 2026;
- A minimum of 745,000 sq. m gross of office floorspace in the network of centres; and
- New waste facilities to increase recycling and disposal capacity, and minimise the amount of waste sent directly to landfill.

Delivering the BDP strategy will require focusing significant development into a number of locations which currently play an important role in providing homes, jobs and supporting facilities. These are identified as Growth Areas, and reflect the availability of development opportunities and existence of current or planned infrastructure.

To meet the needs of the growing population and ensure that sufficient high quality accessible land is available for residential and economic development, the City Council has also planned for the expansion of the urban area through the removal of land from the Green Belt. This will enable the delivery of a planned sustainable urban neighbourhood and a large employment site both located in the northeast of the City. These areas are also identified as Growth Areas.

The Growth Areas are:

- City Centre
- Greater Icknield
- Aston, Newtown & Lozells AAP
- Sutton Coldfield
- Langley Sustainable Urban Extension
- Peddimore
- Bordesley Park AAP
- Eastern Triangle
- Selly Oak and South Edgbaston
- Longbridge AAP

The wider City will also see levels of growth reflecting the historic patterns of development and availability of land. This distribution of growth is more dispersed, focused on

opportunity sites and key transport corridors. This includes housing renewal areas, such as Kings Norton and Druids Heath, areas of employment land, and District and Local Centres.

The strategy of the BDP is to accommodate as much of the City's housing requirement as possible within the boundary. However, the land that is available to the City to accommodate future development is limited. Alongside the BDP, a wider growth strategy for the LEP area and other adjoining authorities will set out how and where the remaining housing to meet the needs of Birmingham could be delivered. This will take account of historic trends where adjoining authorities have accommodated a proportion of the City's growth.

### **3. BDP – Viability and Deliverability**

The production of the BDP is supported by an up to date and relevant evidence base about the social, economic and environmental aspects of the area and future growth in line with the National Planning Policy Framework (NPPF). The NPPF specifically requires plans to pay careful attention to viability and ensure that plans are deliverable (NPPF para 173). Local Planning Authorities are also required to support the delivery of certain types of development by, for example:

- identifying a supply of deliverable sites sufficient to provide five years' worth of housing against their housing requirements, and identify a supply of specific deliverable sites or broad locations for housing growth for years 6-10 and, where possible, for years 11-15 (NPPF para 47); and
- assessing the existing and future supply of land available for all types of economic development and its sufficiency and suitability to meet identified needs (NPPF para 161)

The studies which form the evidence base have analysed overall issues of deliverability of development in Birmingham, including viability considerations, market conditions and infrastructure requirements. The studies were mostly prepared during the challenging economic conditions during 2008 to 2011 which impacted on the ability of developers to bring sites forward, although the studies have considered long term approaches and modelled various scenarios (taking account of a wide range of issues). It should also be noted that there are signs that the market conditions are improving.

The following is a summary of these studies and reflects on the position regarding the delivery of development.

- Affordable Housing Viability Study (2010)

The Affordable Housing Viability Assessment was primarily aimed at ascertaining whether the City Council's emerging affordable housing policy was likely to deliver affordable housing, however it also provides a sound analysis of the viability of housing development generally.

The assessment was undertaken using the Three Dragons Development Appraisal Toolkit. This provides a residual valuation taking into account site specific factors. The main output of the model is the residual value which is available to be shared between the developer and the landowner. It takes account of house prices, dwelling mix, rental values, development costs together with abnormal costs and the impact of providing affordable housing and other planning obligations. The study took account of market trends including house prices and land values.

The assessment acknowledged that the timing, degree and implications of economic recovery are difficult to predict. However, the assessment modelled market growth scenarios and considered the viability of development with and without affordable housing, under growth circumstances of between 1% and 9%.

The assessment divided the city into ten housing sub markets and assumed a residual value of £1m. At 1% growth the study found that development was viable in seven of the ten market areas to 2021 and was viable in an eighth market area until 2016 (when requirements for zero carbon buildings impacts on viability). Generally, the higher the growth scenario the more viable development becomes. However two of the market areas, remain problematic irrespective of the growth scenario analysed, particularly in the short term. A number of policy approaches were suggested to facilitate the provision of affordable housing.

- Community Infrastructure Levy (CIL) – Economic Viability Assessment (2014 Update)

The Economic Viability Assessment reports were prepared to understand the potential for the establishment of a CIL charge across Birmingham. In preparing this analysis, the area's market conditions for residential and commercial development were taken into account, including land values. It was noted that the market for residential and commercial development is fragile and subject to wider fluctuations and volatility at the national and regional level.

Following consultation on the CIL in 2013, the viability assessments were updated in 2014 to reflect comments made by the development industry and others. The revised draft charging schedule sets out that various levels of CIL can be charged on different types of development, although in some cases these charges have been reduced. This approach should ensure that CIL charges do not prejudice the economic recovery, whilst still maintaining an appropriate balance between funding for infrastructure and its impact on viability.

The introduction of the CIL, as well as changing market conditions, will be monitored going forward to assess the impact on the delivery of development and infrastructure.

- Strategic Housing Land Availability Assessment (SHLAA) (2014)

The SHLAA is a study of sites within Birmingham that have the potential to accommodate housing development. The SHLAA has a clear focus on capacity within the urban area and the recycling of identified brownfield land and windfall development.

The 2014 SHLAA sets out a capacity of 38,395 dwellings on identified sites (such as those under construction and with planning permission), and 8,435 dwellings on unidentified sites (such as windfalls and bringing vacant properties back into use). This gives a total capacity of 46,830 dwellings. The SHLAA identifies capacity by supply period (within 5 years, 6-10 years and beyond 10 years). The capacity of identified sites within the first 5 years is 11,881 dwellings.

Sites within the SHLAA are assessed for their suitability, availability and achievability to make a judgment in the plan making context as to whether a site can be considered deliverable, developable or not currently developable for housing development. To be considered deliverable a site is available now, offers a suitable location for housing development now and there is a reasonable prospect that housing will be delivered on the

site within five years from the date of adoption of the plan; and to be considered developable a site should be in a suitable location for housing development, and there should be a reasonable prospect that it will be available for and could be developed at a specific point in time. The SHLAA notes that whilst there are positive indicators that the City Centre housing market is improving, a cautious approach has been taken to assessing what development might take place in the City Centre, particularly in the short term given the markets current reluctance to build apartments.

The sites in the SHLAA form part of the site assessment in Section 4. The assessment undertaken in the SDP offers a more detailed analysis on large sites.

- Retail Studies

The production of the retail elements of the BDP have been informed by retail studies, including the Birmingham Retail Needs Assessment (BRNA) Update (2013), and City Centre Retail Assessment (2013).

The BRNA (2013) provides an update to an earlier retail study, and reflects the changes that are underway in the retail market influencing expenditure. It sets the overall comparison retail figures included in the BDP for the hierarchy of Centres and the approach to convenience retail. The study was updated to reflect the changed market conditions and amended population projections. Approaches are set out for some of the key centres, as well as some delivery considerations.

The City Centre Retail Assessment provides an in-depth review of retail performance to identify the potential to strengthen the retail core as a top retail destination. The study notes the challenging market to delivering retail development, including the existing planning permission at Martineau Galleries Phase 2 and areas with high vacancy rates. However, it concludes that there is a demand for space in the City Centre and, that to ensure delivery, there needs to be a focus on quality of place, with new developments likely to offer a mix of retail and leisure alongside high quality public realm.

- Employment Land and Office Targets Study (2013)

The Employment Land and Office Targets Study considers future requirements for Birmingham's employment land supply and office development up to 2031. The study considered both demand and supply for employment land and office development.

For demand, a model was produced based on economic forecasts (utilising the Cambridge Econometrics LEFM) and historic completion rates. From this a range of potential levels of demand was produced. This was then compared against the currently identified supply of land to identify Birmingham's ability to meet the anticipated demand for both employment and office development over the plan period.

The deliverability of the identified sites (from the Employment Land Review) was assessed as part of the appraisal of supply. As part of this, marginal sites with little possibility of delivery were excluded from the total supply and have been recommended for alternative



uses. The study makes recommendations as to how the City should seek to plan to accommodate the anticipated level of growth.

The report recommends targets for the supply of employment land and office development sites that the City Council should seek to ensure. It also acknowledges that both supply and demand will need to be monitored to ensure that there is neither a significant under or over supply which could impact on the City's economic prosperity.

- Infrastructure Delivery Plan (2014)

The Infrastructure Delivery Plan (IDP) identifies the key infrastructure necessary to support the growth aspirations of the BDP. It contains infrastructure proposals which are site / area specific and identifies City wide infrastructure needs. There are clear infrastructure proposals which are needed to unlock development proposals, whereas some infrastructure is needed to meet wider Plan objectives. The IDP identifies the infrastructure considered essential to deliver during the Plan period.

The key spatial infrastructure proposals from the updated IDP are contained in section 4 to illustrate how the Growth Areas and the rest of the City need to develop sustainably, although this predates the Government's announcement on LEP Growth Deals and the updated Enterprise Zone Investment Plan. These additional sources of funding will be reflected in future updates to the SDP and IDP.

#### Policies in the BDP

The NPPF requires plans to be deliverable, and states that "developments should not be subject to such a scale of obligation and policy burden that their ability to be developed viably is threatened" (NPPF para 173). There are challenges to bringing development forward in difficult market conditions, as experienced over the past few years, as well as area / site specific considerations which can add to development costs. These issues are reflective of the dynamic and diverse nature of Birmingham, as well as the wider economy.

Overall, the evidence for the BDP indicates that development in the City should be viable. In addition, the BDP has incorporated viability considerations as part of its policies, such as on affordable housing. This provides a flexible framework which can take account of changing market conditions, priorities and site specific circumstances. The delivery of comprehensive redevelopment, particularly in the Growth Areas, will also positively influence the market as upfront infrastructure and development is delivered which will improve perceptions and market conditions.

#### 4. Development Sites – Delivery Assessment

To demonstrate that development opportunities / sites are capable of being delivered, an assessment has been carried out of considerations which impact on delivery. The analysis looks at key issues faced by a developer (including remediation, ownership and utilities), and also indicates the level of significance of each consideration. This provides an overview of the delivery issues for sites in the City.

A threshold was set for the inclusion of sites in the assessment to focus on those sites which make a significant contribution to the overall strategy of the BDP. There is therefore a focus on larger sites, with schemes in the City Centre having a slightly higher threshold given the scale and density of development in the centre. Small sites, which mainly relate to windfall developments and the churn of small scale brownfield sites in the urban area, are therefore not assessed. Sites under construction are generally excluded from the assessment.

Appendix A contains a technical note on the inclusion of sites and the use of figures. The thresholds are:

- Residential – sites over 50 dwellings, 100 dwellings in the City Centre
- Employment – all ‘Best’ quality sites, and all remaining sites over 1ha
- Retail (comparison & convenience) – sites over 1,000 sqm, 5,000 sqm in the City Centre
- Office – sites over 1,000 sqm, 5,000 sqm in the City Centre
- Other – any other significant developments

Sites with and without planning permission are included in the analysis where they are above the set threshold. There are no anticipated major planning issues on any sites included in the assessment as they are based on the evidence underpinning the BDP. The planning status provides an indication of the level of certainty there will already be on delivery (reflecting NPPF para 47), and also reflects the long term strategy contained in the BDP which supports sustainable growth.

The assessment of the individual delivery considerations was carried out using a ‘traffic-light’ system (RAG status) to highlight the relative significance of the issue. The status is influenced by any actions in place to address it. For example, there may be land ownership issues on a site; however the risk would be lowered if a compulsory purchase process has started. The RAG status for the individual delivery considerations are:

<b>RAG Status</b>	<b>Individual Delivery Considerations</b>
Low	No issue
Medium	Identified issue
High	Identified constraint that requires further attention

The assessment looks at key considerations which can impact on site delivery, and is based on the best available knowledge at the time of appraisal. It considers issues which are largely in the control of the public sector and private developers / landowners to understand if there are any abnormal issues / costs associated with bringing sites forward. The considerations are:

- Remediation – indicates if any land remediation issues are present which may impact on development. They are identified as needing further attention where there is a known problem over and above what developers would normally expect to deal with on a brownfield site.
- Ownership – indicates whether there are land assembly issues which will impact on delivery. Single ownerships are considered to have a lower delivery risk, with multiple and complex ownerships requiring further attention.
- Demolition – indicates the extent of demolition required on site. Cleared / mostly cleared sites have a lower delivery risk, with sites that potentially require extensive and expensive demolition requiring further attention (such as large sites covered by buildings built extensively with brick / concrete).
- Environmental – indicates whether the site is affected by environmental issues which could impact on delivery, such as flood zones, historic environment assets or nature conservation sites. The significance of the asset and how it can be resolved influences the risk. For example, any residential sites in flood zone 3 would have the highest risk.
- Access – indicates whether the site needs alterations to its access to enable site delivery. Small scale changes are lower risk; with extensive changes a higher risk.
- Utilities – indicates whether the site needs works to connect to the utility networks to enable development. Lower risk is associated with sites which already have utilities on site, with highest risk associated with sites with no utilities present and wider network capacity issues.
- Other (e.g. funding / support) – indicates if there are any other site specific issues which impact on delivery, such as known viability issues, and Health & Safety Executive Consultation Zones. A judgement was made on a case by case basis as to the impact of the issue.

A RAG status is also applied for the overall delivery risk to the site, which reflects its current status and indicative phasing. For example, longer term sites (5-10, 10+) may currently have constraints which need further attention, however overall the site still has a reasonable prospect of coming forward (provided the issue does not preclude development). The overall site delivery risk provides a high level view to illustrate the extent of the various site constraints, their likely impact and the actions and resources needed to help bring development forward. The RAG categories for overall site delivery are:

<b>RAG Status</b>	<b>Overall Site Delivery</b>
Low	No overall risk to delivery
Medium	Site has a reasonable prospect of delivery, with actions to address issues / constraints
High	Site has no prospect of delivery

The following analysis of sites is based on the Growth Areas in the BDP, and also provides an analysis of sites outside the Growth Areas within the thresholds. It sets out the:

- Spatial Strategy and Opportunities
- Overall Levels of Growth
- Strategic Infrastructure Requirements
- Site Delivery Assessment
- Delivery and Phasing

## 4.1 City Centre

### Spatial Strategy and Opportunities

The City Centre has the potential to accommodate in the region of 12,800 new homes, 700,000 sqm of office floorspace and 160,000 sqm of comparison retail floorspace, within a wider aspiration to provide a higher quality environment. This will support the City Centres continued economic success and its position as a top visitor destination.

The spatial strategy for the City Centre focusses on five strategic locations where significant levels of growth will be targeted, supported by necessary infrastructure provision. These five locations have capacity within the strategic sites for the majority of development for residential, office, retail and leisure uses. Outside these strategic locations, the wider City Centre also makes an important contribution to growth and delivery of the overall strategy.

Achieving growth within the City Centre has already started with a number of schemes already completed or underway. Examples include offices at Two Snowhill and Post and Mail in the Snow Hill District, and enhanced education facilities at Birmingham City University Phase 1 and 2 in Eastside. The early delivery of infrastructure is also supporting growth, including the completed Library of Birmingham in Westside (which helps unlock the Paradise Circus site) and Eastside City Park. There are transport infrastructure schemes under construction to deliver enhanced connectivity including New Street Station and the Metro extension. The City Council has significant land assets and has used these to facilitate development through joint ventures. The Enterprise Zone and HS2 (in the longer term) will also supporting the accelerated delivery of growth in the City Centre.

## Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	3,119	4,830	<b>7,949</b>
Student (bed spaces)	1,743	0	<b>1,743</b>
Office (sqm)	610,280	120,283	<b>730,263</b>
Retail (convenience and comparison) (sqm)	174,905	70,783	<b>245,688</b>
Leisure (sqm)	105,650	33,066	<b>138,716</b>
Other (including hotels) (sqm)	107,000	14,000	<b>121,000</b>

## Strategic Infrastructure Requirements

Infrastructure	Status	Total Cost (million)	Delivery Timescale
<b>ENVIRONMENT AND SUSTAINABILITY</b>			
City Centre Utilities – Energy and Water Infrastructure	Proposal	£20m	0-10+
Extending Combined Heat and Power Network	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
Schemes to Address Flooding	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
<b>ECONOMY AND NETWORK OF CENTRES</b>			
Paradise Circus	Funding identified	£87.8m	0-10
Enterprise Zone Local Infrastructure Fund - Arena Central and Masshouse Circus	Funding identified	£12.5m	0-5
Snow Hill Station Phase 1 (including Snow Hill Gateway public realm scheme)	Proposal	£10m	0-5
Smithfield Masterplan - including relocation of wholesale markets	Proposal	£75m	0-10+

<b>CONNECTIVITY</b>			
Birmingham Ring Road project, including five junction improvements – Bordesley, Holloway, Haden, Curzon and Ashted Circus	Funding partly identified	£13.8m	0-5
Redevelopment of New Street Station	Funding identified	£600m	0-5
One Station – public realm enhancement between New Street Station and Moor Street Station	Funding identified	£5.5m	0-5
Snow Hill Line Enhancements	Proposal	£20.5m	0-10
Metro Extension – Stephenson Street to Centenary Square / Centenary Square Redesign	Funding identified	£42.4m	0-10
Improved City Centre connections (including Connecting Economic Opportunities EZ project, Church Street Link)	Funding identified	£24m	0-10
Making the Connections public realm scheme	Funding identified	£8m	0-5
Wayfinding, Signage and Information Package	Funding identified	£3.1m	0-5
Snow Hill Station Redevelopment Phase 2 (station enhancements and development above existing car park)	Proposal	£10m	5-10+
Metro Extension – Centenary Square to Edgbaston	Proposal	£67.5m	0-10
Metro Extension – Eastside / HS2 Station	Funding partly identified	£103.5m	0-10+
Rail improvements to Tamworth / Sutton Park / Camp Hill Leicester Line / Services / Stations (including Moor Street)	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
Birmingham Cycle Revolution	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
Eastside (City Centre) to Birmingham Airport (HS2 Interchange) – Rapid Transit / SPRINT	See Outside the Growth Areas	See Outside the Growth Areas	10+

## City Centre – Strategic Locations for Development

### Spatial Strategy and Opportunities

There are five strategic locations with significant development potential in the City Centre. Development in these areas will go a long way towards achieving the scale of growth and environmental change envisaged for the whole of the City in the BDP. The areas are:

- Eastside
- Southern Gateway
- New Street Southside
- Westside
- Snow Hill District

### Strategic Locations for Development – Levels of Growth

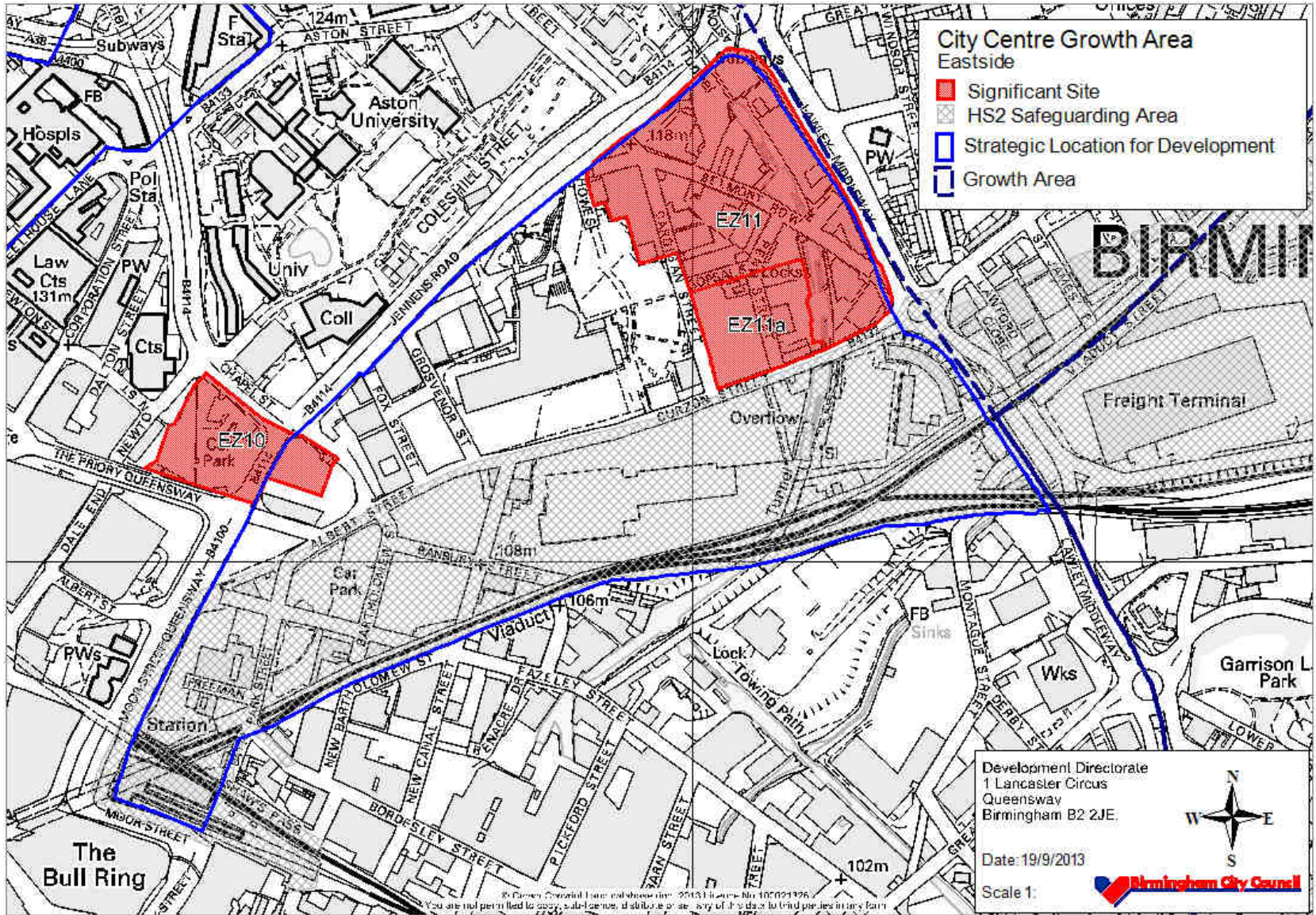
Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	1,136	3,272	<b>4,407</b>
Office (sqm)	439,180	53,883	<b>493,063</b>
Retail (convenience and comparison) (sqm)	78,005	58,483	<b>136,488</b>
Leisure (sqm)	80,000	30,616	<b>110,616</b>
Other (including hotels) (sqm)	45,800	9,000	<b>54,800</b>

- Eastside

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Masshouse Circus	EZ10	1.5 ha	Office led mixed use including 200 dwellings, 72,000 sqm office , 14,000 sqm hotel, 5,000 sqm retail	5-10, 10+	Yellow	Green	Green	Green	Green	Green	Green	Green
BCU Phase 3	EZ11A	1.3 ha	Education facilities 7,150 sqm	0-5	Green	Green	Green	Green	Green	Green	Green	Green
Eastside Locks	EZ11	5.3 ha	Office led mixed use including 80 dwellings, 68,500 sqm office uses, hotel 8,800 sqm, retail 6,000 sqm	0-5, 5-10, 10+	Yellow	Green	Green	Yellow	Yellow	Green	Green	Green
<b>Further Capacity Identified in BDP / Evidence</b>												
None												



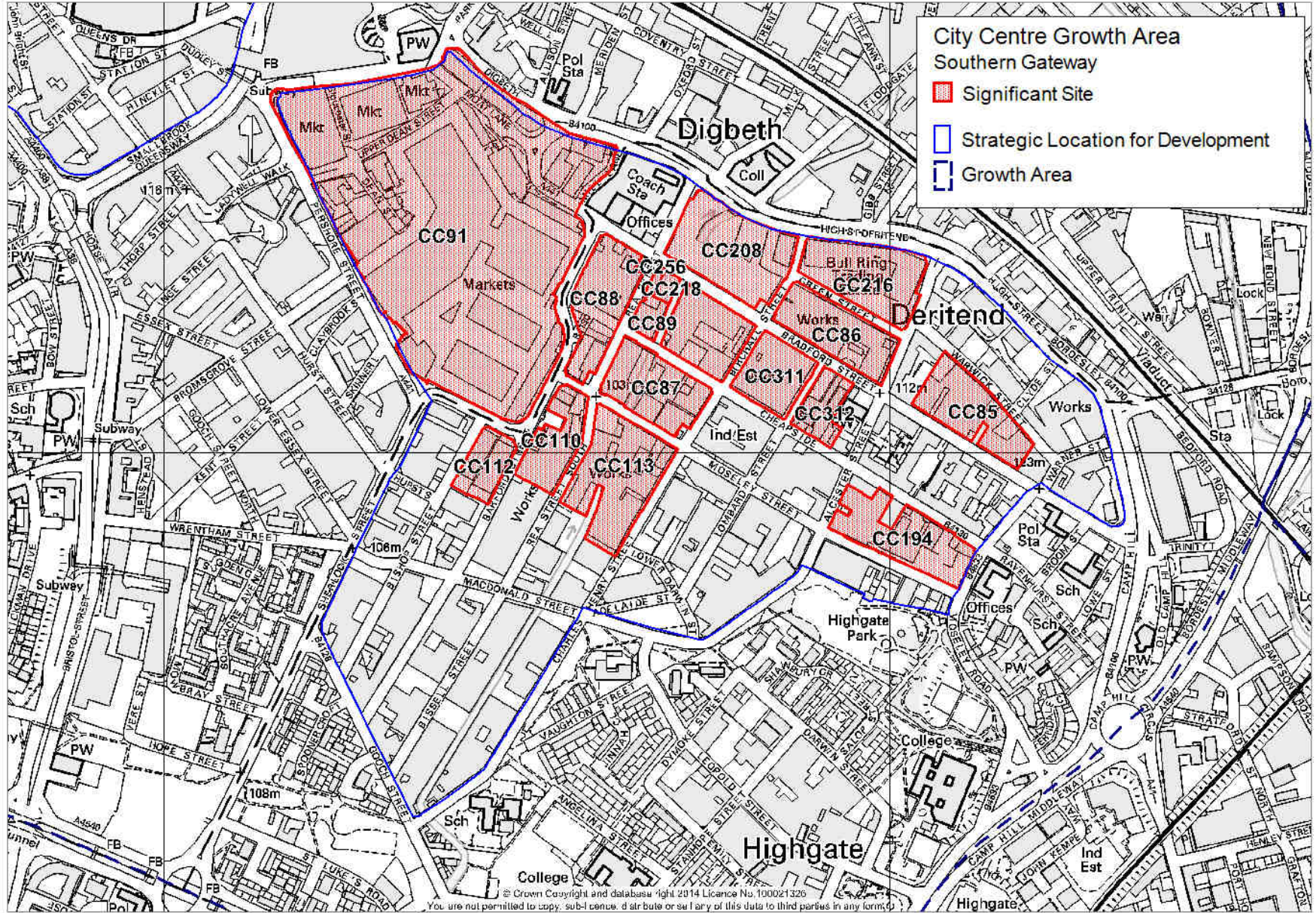


- Southern Gateway

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Warwick Street / Bradford Street	CC85	1.1 ha	417 dwellings	5-10, 10+								
Bullring Trading Estate	CC216	1.4 ha	Mixed use development - 342 dwellings, 8,300 commercial (including A and B1a uses)	10+								
<b>Further Capacity Identified in BDP / Evidence</b>												
Smithfield Masterplan	CC91	13.1 ha	Mixed use - 100,000 sqm commercial uses, 1,200 dwellings	5-10, 10+								
Connaught Square (within River Rea Corridor)	CC208	1.7 ha	Mixed use development – 167 dwellings, plus opportunities for other uses.	10+								
Moseley Street / Cheapside	CC194	1.3 ha	329 dwellings. Potential for ground floor commercial uses	0-5, 5-10								
River Rea Corridor	CC87, 88, 89, 110, 112, 113, 214, 218, 256	6.6 ha (whole area)	850 dwellings. Opportunities for ground floor commercial uses	10+								

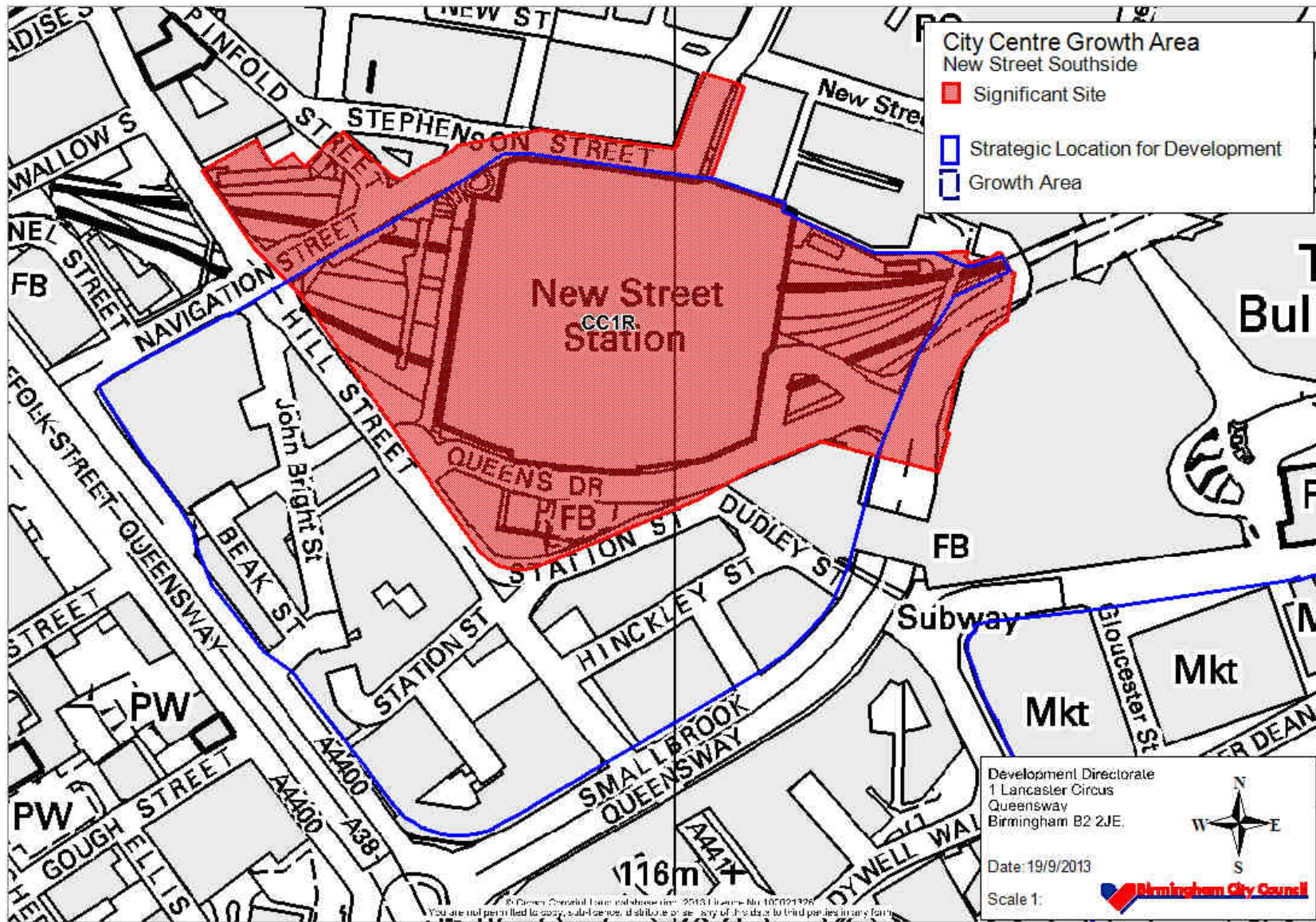
Green Street / Bradford Street	CC86	1.1 ha	203 dwellings	5-10, 10+	Yellow	Red	Yellow	Yellow	Light Green	Yellow	Light Green	Yellow
Former Harrison Drape Works, Lombard Street	CC311	0.8 ha	313 dwellings	0-5	Yellow	Light Green	Yellow	Yellow	Light Green	Yellow	Light Green	Yellow
St Annes Church, Lombard Street	CC312	0.5 ha	150 dwellings	5-10	Yellow	Light Green	Light Green	Yellow	Light Green	Yellow	Light Green	Yellow



- **New Street Southside**

Site Delivery Assessment

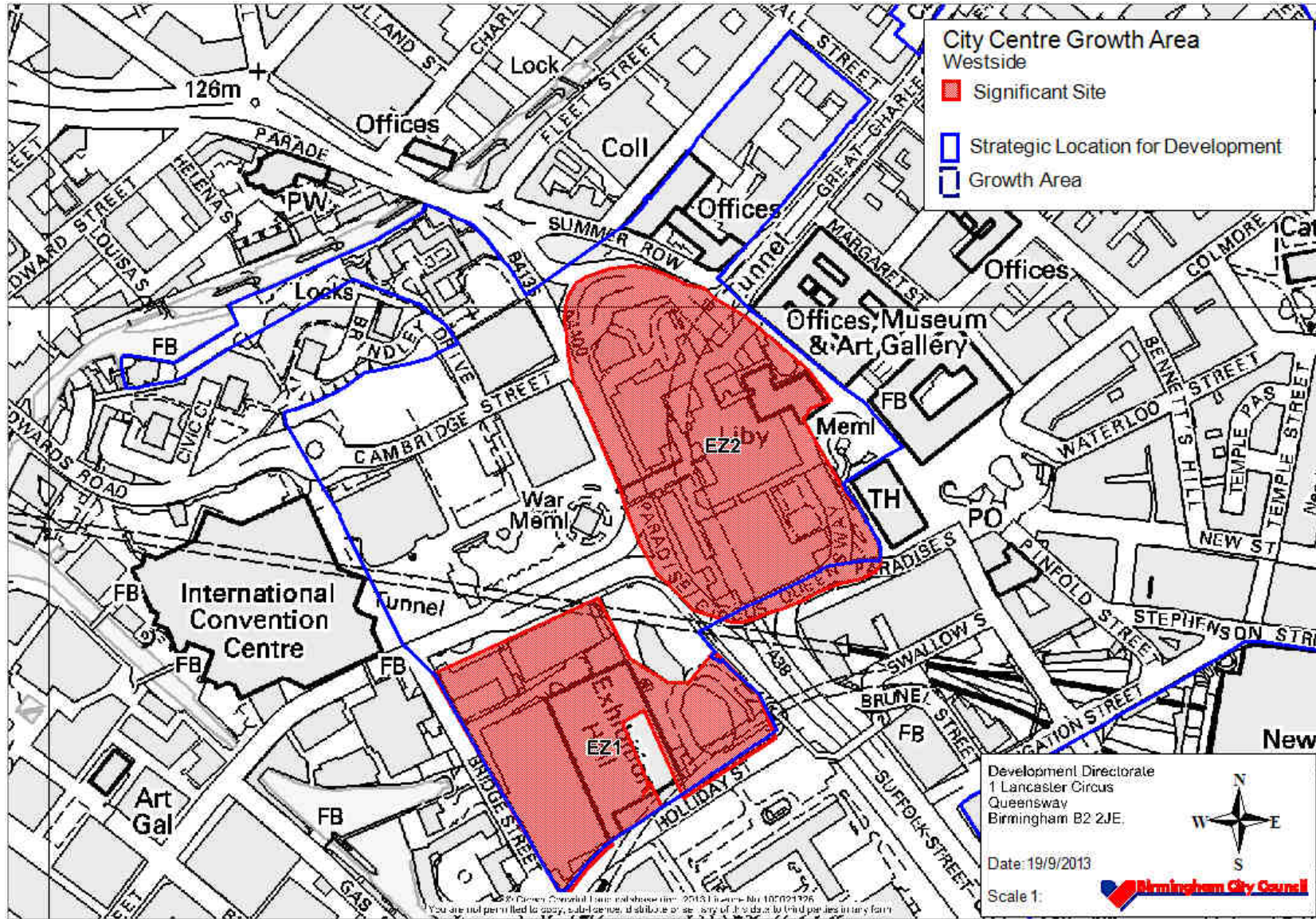
Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall is the site considered deliverable?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
New Street Station	CC1R	6ha	New Street Station - reconfigured and improved rail station	0-5								
Pallasades / John Lewis	CC1R	As above	Retail led development - 23,225 sqm retail (A uses)	0-5								
<b>Further Capacity Identified in BDP / Evidence</b>												
None												



- Westside

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall is Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Paradise Circus	EZ2	4 ha	Office led mixed use – 160,000 sqm office, 6,500 sqm A Class uses, 4,600 sqm leisure and 9,000 sqm hotel	0-5, 5-10								
Arena Central	EZ1	2.8 ha	Leisure led mixed use development - office 46,000 sqm, retail (A Class uses) 51,000 sqm, leisure / entertainment / health and fitness 65,000 sqm, 7,000 sqm hotel, 97 dwellings	0-5, 5-10, 10+								
<b>Further Capacity Identified in the BDP / Evidence</b>												
None												

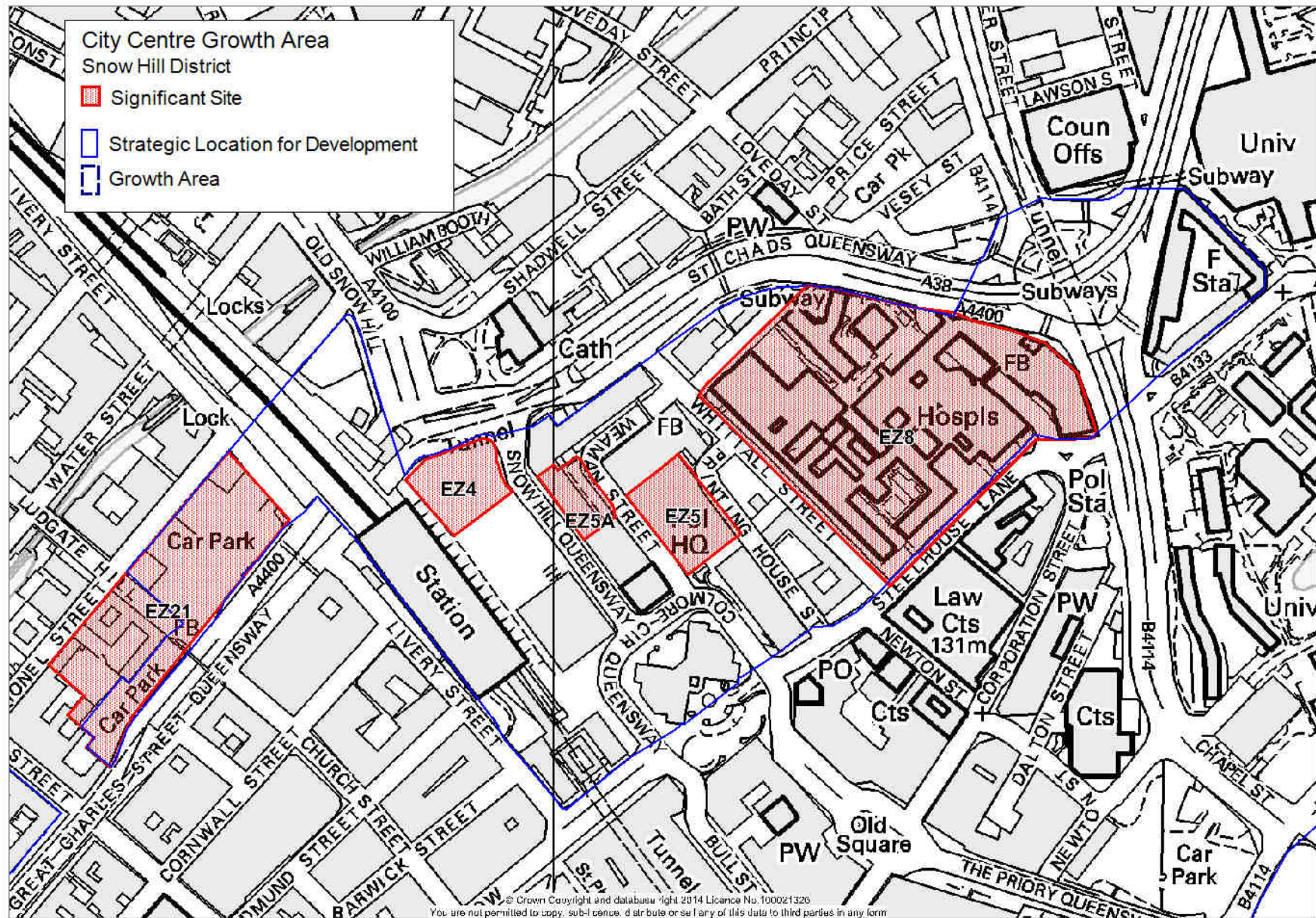




- **Snow Hill District**

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Snowhill Building 3	EZ4	5 ha	Office led mixed use - 38,000 sqm office, 1,205 sqm retail, 10,400 sqm gym / conference.	0-5								
Post and Mail Building – Phase 2	EZ5	0.4 ha	Predominantly office use - 33,180 sqm, with potential to deliver a mix of uses.	5-10								
The Strip	EZ5A	0.2 ha	21,500 sqm office floorspace	5-10								
<b>Further Capacity Identified in BDP / Evidence</b>												
Birmingham Children’s Hospital	EZ8	3.8 ha	Potential to accommodate a range of uses approx. 90,000 sqm. Any development will be a windfall in terms of contributing to targets	10+								
Ludgate Hill	EZ21	1.6 ha	Office led mixed use - 37,000 sqm office, 4,000 sqm retail, 59 dwellings	5-10, 10+								



## Delivery and Phasing

Each of the Strategic Locations will require different levels of support to bring development forward:

- Eastside

There is a large degree of planning certainty in the Eastside area as it has already been a focus for development and infrastructure, with the delivery of Millennium Point, the award winning Eastside City Park, local transport improvements and other infrastructure. The relocation of Birmingham City University is supporting the regeneration of the area, with Phase 1 delivered in 2013, and Phase 2 expected to complete in 2015. Both Eastside Locks and Masshouse Circus sites are in the Enterprise Zone, and this programme will help enable delivery. At Eastside Locks, a development agreement is in place with Goodman Developments, and land has already been assembled following a long standing joint venture on the site between the City Council and the Homes & Communities Agency. Development is starting to come forward on site, including the Alumno student scheme (625 bedspaces).

The future delivery of Eastside will be strongly influenced by the proposed HS2 station in the area. This infrastructure will open up new opportunities for investment and additional development opportunities may become available at City Gate Park and Curzon Park following the completion of this project, although it is not a pre-requisite to enable the delivery of all sites. Other transport related infrastructure projects, including committed ring road junction improvements will support growth in Eastside.

- Southern Gateway

The Southern Gateway is a significant opportunity to further expand the City Centre Core and accommodate growth; however this will pose a number of challenges given the scale of change envisaged. The area is at the early stage of masterplanning with the majority of development capacity currently without planning permission. A number of baseline studies are underway or have been completed to understand constraints and infrastructure needs.

The City Council is already helping to progress change in the area by committing to the relocation of the Wholesale Markets to enable the development of the Smithfield Masterplan site. This site is within the Enterprise Zone and the majority is in the ownership of the City Council. The delivery of housing in the River Rea Corridor requires further work with business and landowners to address delivery issues to enable development through relocation of businesses and land assembly. Potentially additional opportunities for housing could be identified.

Strategic infrastructure will be required to enable the delivery of this area to address issues of floodrisk, ensure utilities have the capacity to accommodate growth, and to provide high quality connections into the City Centre Core. The City Council is working proactively to address these issues, including working with the Environment Agency and Severn Trent.

Given the scale of change identified for the area and the need for additional planning certainty, the City Council is considering the need for an area specific Local Plan to help facilitate development and give confidence to businesses and investors.

- New Street Southside

Strong progress is already being made on delivering change within this area, with the major redevelopment of New Street Station (including Metro extension) under construction and due to open in 2015. This enhanced and reconfigured strategic infrastructure will improve the experience of visitors and transform perceptions of the City Centre. The expansion of Pallasades Shopping Centre (including a John Lewis store) is also under construction and due to open in in 2015.

The completion of these developments will make important contributions to overall growth, delivering comparison retail and infrastructure required in the City Centre. These developments may open up further opportunities in this strategic location, particularly with links to the Mailbox. The further extension of the Midland Metro to Centenary Square and improved City Centre connections will also improve mobility and the quality of physical environment in the area.

- Westside

The regeneration of Westside is focussed on the delivery of two large mixed use developments which are part of the Enterprise Zone. Paradise Circus is a flagship office development scheme which will make a significant contribution to the provision of new office floorspace in the City Centre. There is a joint venture in place between the City Council, Argent and the British Telecom Pension Scheme. The site has outline planning permission and an approved Full Business Case for investment into infrastructure of which £61.7m was secured from the Enterprise Zone. The compulsory purchase order process is now completed, and the scheme is due to start on site in 2014/15.

Arena Central is another strategic development opportunity. A Masterplan and outline planning permission is in place, and Miller Developments is the developer for the site. The delivery of infrastructure, including the Local Infrastructure Fund bid for the site, will help overcome a number of the wider delivery issues holding up the development.

The delivery of strategic infrastructure will support the growth of the area. The Library of Birmingham has been completed, which helps unlock the Paradise Circus site. Investment in transport infrastructure, including the Metro extension to Centenary Square (including redesign of the square) will improve access and the quality of environment.

- Snow Hill District

Growth in the Snow Hill District is already happening with Two Snowhill completed in 2013, and Post and Mail Phase 1 under construction. A number of other schemes also have permission and / or form part of the Enterprise Zone. A masterplan is being produced for the Snow Hill District to identify key interventions to support development and set out a framework to guide infrastructure investment and future development of key sites. The Colmore Business District is an important partner in this work. The Birmingham Children's Hospital site is a long term opportunity which could add significant development capacity for a range of uses.

There are a number of strategic infrastructure projects which will help secure private sector investment into the area and help delivery. These include the Metro extension linking Snow Hill Station and New Street Station, improvements to Snow Hill Station into a gateway location, and improved connectivity (particularly linking the Jewellery Quarter to the City Centre Core) to enhance its environmental quality.

## City Centre – Outside the Strategic Locations

### Spatial Strategy and Opportunities

Areas outside the Strategic Locations will make an important contribution towards the overall strategy. The City Centre is characterised by seven Quarters each with varying degrees of growth proposed. New development is expected to support and strengthen the distinctive character of the areas raising the overall quality, offer and accessibility.

There are a number of development opportunities in the Quarters. This includes the major development site at Martineau Galleries, office led mixed use developments outside the Central Business District, a number of sites to support the creative industries in Digbeth and the Jewellery Quarter, and capacity for residential development across the City Centre.

### Outside the Strategic Locations – Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	1,983	1,559	<b>3,542</b>
Student (bed spaces)	1,743	0	<b>1,743</b>
Office (sqm)	171,100	66,400	<b>237,500</b>
Retail (convenience and comparison) (sqm)	96,900	12,300	<b>109,200</b>
Leisure (sqm)	25,650	2,450	<b>28,100</b>
Other (including hotels) (sqm)	61,200	5,000	<b>66,200</b>

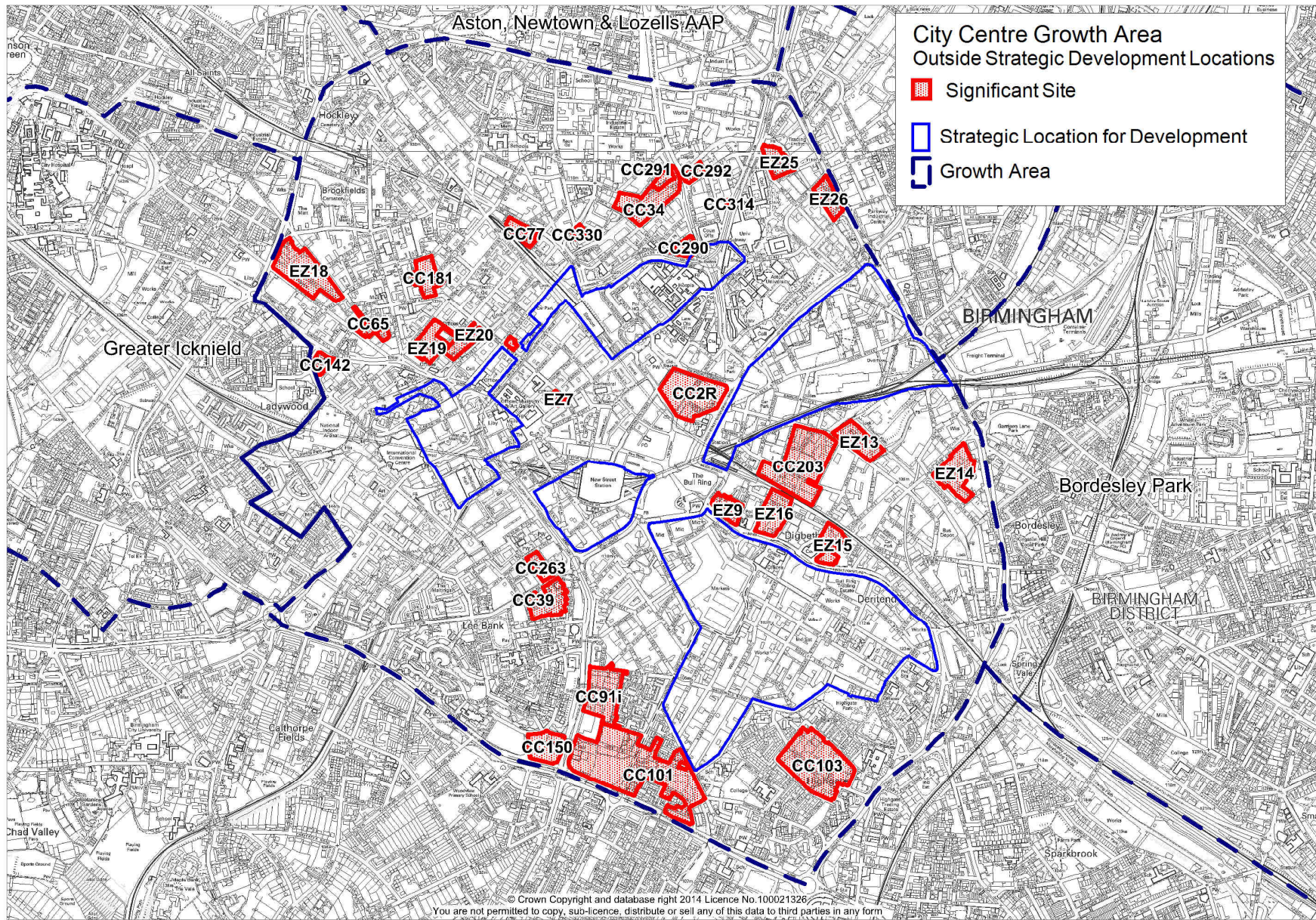
Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Martineau Galleries	CC2R	5.7 ha	Major development site – permission currently in place for a retail led scheme - 85,000 sqm A Class uses, 25,000 sqm office, 340 dwellings, hotel, 25,000 sqm leisure / culture	10+								
103 Colmore Row	EZ7	0.2 ha	Office led scheme - 31,000 sqm plus 1,000 sqm A Class uses	10+								
Beorma	EZ9	0.9 ha	Office led mixed use - 45,000 sqm office, 5,800 sqm hotel, 2,400 sqm retail, 650 sqm leisure	0-5, 5-10								
Great Barr Street	EZ14	2 ha	19,300 sqm office / B class uses	0-5, 5-10								
Smithfield Court	EZ16	1.6ha	Office led scheme - 27,000 sqm plus 1,500 sqm retail	10+								
Typhoo Wharf	CC203	1.2 ha	Mixed use – 5,800 sqm office 353 dwellings, 4,000 sqm retail, 5,300 sqm hotel plus other uses	5-10, 10+								
UCB – Phase 2	EZ19	1.4 ha	12,300 sqm education facilities	0-5								
Newhall Square	EZ20	0.8 ha	Office led mixed use – 18,000 sqm office, 7,800 sqm hotel, 3,000 sqm retail	0-5, 5-10								
60-90 Constitution Hill	CC77	0.6 ha	125 dwellings	0-5, 10+								
Camden Drive / Sloan House	CC65	0.6 ha	146 dwellings	0-5, 5-10, 10+								
Northwood Street	CC181	1.2 ha	148 dwellings	5-10								

Land bounded by Lee Bank Middleway / Spring Street / Bristol Street	CC150	1.5 ha	347 dwellings	0-5									
49 to 51 Holloway Head	CC263	0.5 ha	303 dwellings	5-10									
Canterbury House	CC306	0.2ha	120 dwellings	0-5									
291 to 295 Corporation Street	CC314	0.03 ha	61 student bedspaces	0-5									
Summer Lane, Honduras Wharf, Phase 2, Aston	CC330	0.2 ha	101 dwellings	0-5									
Bagot Street II	CC292	0.3 ha	492 student bedspaces	0-5									
Lancaster Gateway	CC290	0.5 ha	734 student bedspaces	0-5									
Globe Works	CC291	0.4 ha	456 student bedspaces	5-10									
<b>Further Capacity Identified in BDP / Evidence</b>													
Monaco House, Bristol Street	CC91i	2.7 ha	Retail let mixed use - retail 8,300 sqm, hotel 5,000 sqm, leisure 2,450 sqm	0-5									
Digital Plaza	EZ25	0.9 ha	Office / Technology based uses – 15,000 sqm	5-10									
Venture Way	EZ26	1 ha	Office / Technology based uses – 15,600 sqm	10+									
Custard Factory Extension	EZ15	1 ha	9,300 sqm office / b1 class uses	10+									
Warwick Bar	EZ13	1.5 ha	3,500 sqm office / workspace	5-10									
St George's Urban Village	EZ18	3.1 ha	Office led mixed use - 23,000 sqm office, 4,000 sqm retail, 300 dwellings	0-5, 10+									
Emily St / Dymoke St / Darwin St	CC103	5 ha	225 dwellings	10+									



Junction of Bristol St / Belgrave Middleway / Sherlock St	CC101	4.3 ha	430 dwellings	0-5, 5-10	Green	Green	Green	Yellow	Green	Yellow	Green	Green
Ernest Street Area	CC39	1.4 ha	272 dwellings	5-10, 10+	Yellow	Yellow	Yellow	Green	Green	Yellow	Green	Yellow
Former Sandpits Industrial Estate, Summer Hill Street	CC142	0.4 ha	133 dwellings	5-10	Yellow	Green	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Lower Loveday St / Hanley St / Princip St / New Town Row	CC34	2.8 ha	199 dwellings	10+	Yellow	Red	Yellow	Yellow	Green	Yellow	Green	Yellow



## Delivery and Phasing

The development potential within the wider City Centre will contribute towards the overall strategy. The scale of change is smaller than the Strategic Locations for development; however there are still key sites which will support growth. Each of the Quarters has a role to play within this context. Southside & Highgate and Westside & Ladywood are mainly identified for residential growth along with other visitor and entertainment based uses, Digbeth for supporting employment opportunities in the creative sector, and St George & St Chad and the Jewellery Quarter providing opportunities for employment and residential development. A number of schemes have already been delivered over recent years and some schemes are under construction. These areas will also benefit from the investment in infrastructure being targeted in the strategic locations. The following is a summary of the key sites / areas and delivery issues:

- Martineau Galleries

The Martineau Galleries site has an extant planning permission for a large retail led mixed use scheme which has the potential to add significant floorspace to the City Centre. There have been difficulties in bringing this site forward, particularly in the challenging retail and wider economic environment to secure finance and occupiers to deliver a scheme. Given these difficulties, this project has a longer-term delivery timeframe and remains a significant opportunity to accommodate growth in the City Centre. The proposed HS2 Station in Eastside will provide an added impetus for the site which will help assist with delivery.

- Jewellery Quarter

There are a number of development opportunities available in this part of the City Centre. This includes Enterprise Zone sites at St George's Urban Village, Newhall Square and University College of Birmingham which all have elements of their schemes under construction in 2014. There are some larger residential schemes, and a number of smaller scale residential sites as well. Some of these sites are capable of coming forward in the short term despite market difficulties, including Canterbury House (CC306) which involves the conversion of an office block to residential under permitted development rights. The historic assets in the area are a delivery consideration, but also an opportunity to be able to bring back into use existing buildings.

A Neighbourhood Plan is also under preparation for the area. The Jewellery Quarter Development Trust is an important partner in this part of the City Centre. The successful development of this area needs to have strong regard to reconciling different land uses in the area, particularly in relation to the historic environment and jewellery industry. Strategic infrastructure in Snow Hill District and connections to the City Centre Core will enhance the overall viability of development in the Jewellery Quarter.

- Southside & Highgate

Delivery in the Southside & Highgate area will be largely influenced by development and infrastructure in the Southern Gateway. Consequently there are a large number of delivery considerations, including the need to undertake further work with landowners and businesses. There are development opportunities in the area to provide residential development. In the short term this includes land at the Junction of Bristol St / Belgrave Middleway / Sherlock St (CC101). This site is in the ownership of the City Council / Homes & Communities Agency and a developer is being sought to bring forward early delivery. The development of small sites will benefit from the wider regeneration of the area and the provision of strategic infrastructure.

- Digbeth

There are six Enterprise Zone sites within the Digbeth area which will make an important contribution towards City Centre growth. These range from large scale office schemes, such as Beorma (phase 1 under construction), to smaller scale opportunities, possibly involving the reuse of existing buildings, for the creative industries sector. As with other areas, there are multiple ownerships, historic environment and floodrisk issues to address, although there is a strong degree of planning certainty in place.

The delivery of strategic infrastructure, particularly to improve connections to the City Centre Core and the delivery of the Southern Gateway, will improve the attractiveness of the area for investment. HS2 will also play a key role in accelerating development activity and accessibility to this part of the City Centre.

- Westside & Ladywood

There are a number of residential development opportunities in this Quarter, mainly linking into growth in the Jewellery Quarter and Southside & Highgate. There are also a number of opportunities in the Greater Icknield Growth Area (see section 4.2) which overlaps with this area. The majority of sites already have a degree of planning certainty, and the emerging Greater Icknield Masterplan will help give clarity on investment opportunities and infrastructure provision.

## 4.2 Greater Icknield

### Spatial Strategy and Opportunities

Greater Icknield will be developed as a sustainable neighbourhood that provides easy access to the opportunities of the City Centre while at the same time providing the environment, facilities and types of accommodation suitable for family living. It is proposed that approximately 3,000 new homes will be built and that 1000 new jobs will be created. The neighbourhood will be supported by the provision of a new secondary school, leisure facilities, local scale retail and significantly improved connectivity both within and to surrounding areas.

### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	1,150	1,692	<b>2,842</b>
Retail (convenience and comparison) (sqm)	2,500	0	<b>2,500</b>
Leisure (sqm)	4,460	0	<b>4,460</b>
Other (sqm)	7,000	10,000	<b>17,000</b>

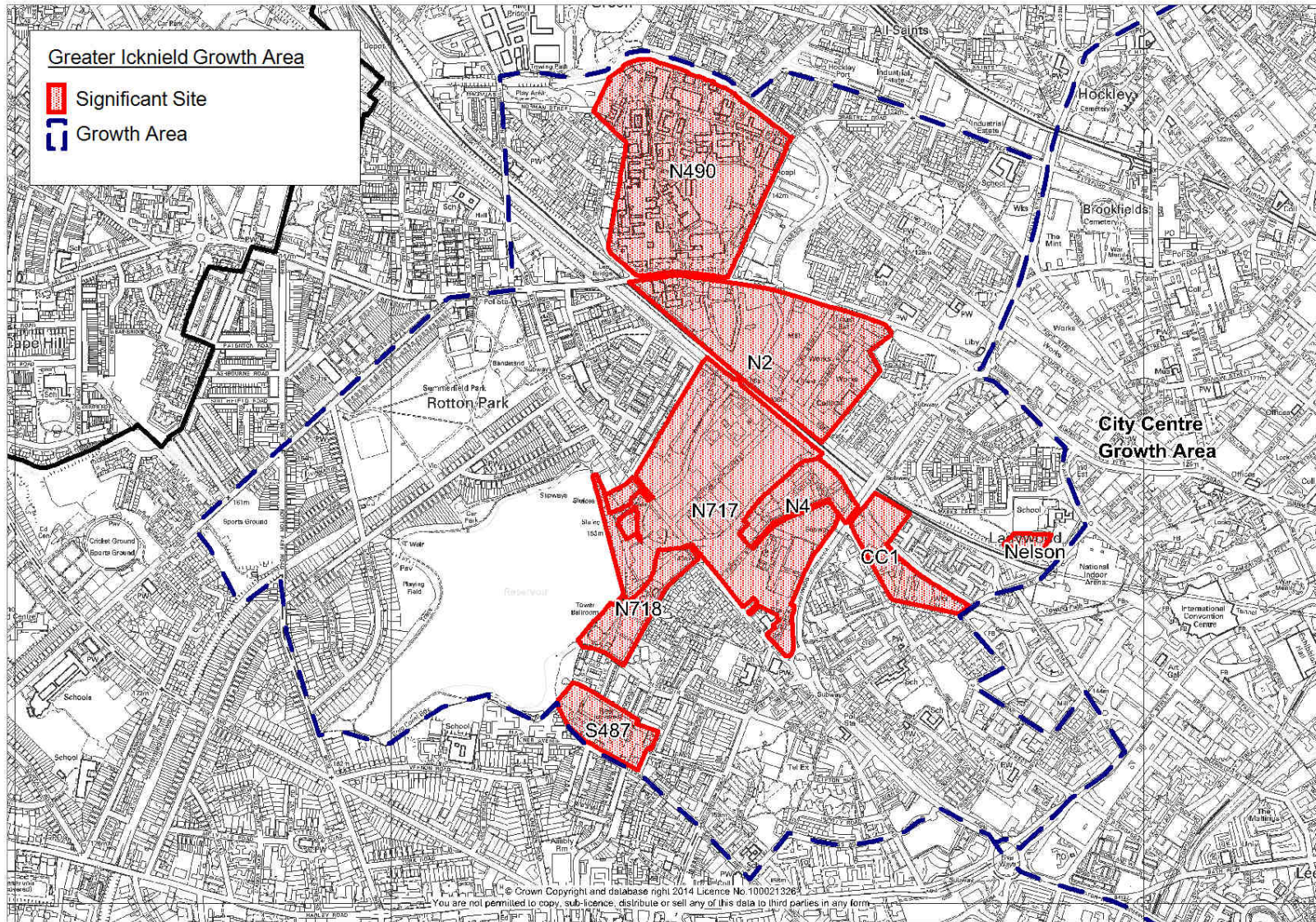
### Strategic Infrastructure Requirements

Infrastructure	Status	Total Cost (million)	Delivery Timescale
<b>HOMES AND NEIGHBOURHOODS</b>			
New Secondary School	Funding partly identified	£16-18m	0-10
New Leisure Centre	Funding partly identified	£8m	0-10
<b>CONNECTIVITY</b>			
Dudley Road / Spring Hill Corridor Highway Improvements	Proposal	£30m	0-10+
Birmingham Cycle Revolution	See Outside the Growth Areas	See Outside the Growth Areas	0-10+

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Icknield Port Loop	N717	21.2 ha	Up to 1150 dwellings and associated facilities including 7,000 sqm hotel and 4,460 sqm swimming pool	0-5, 5-10, 10+	Yellow	Green	Green	Green	Yellow	Yellow	Green	Green
<b>Further Capacity Identified in BDP / Evidence</b>												
Icknield Port Loop (land outside of planning permission)	N4 & N718	6.9 ha	Up to 250 dwellings	10+	Yellow	Green	Yellow	Green	Yellow	Yellow	Green	Green
City Hospital	N490	20 ha	1000 dwellings and associated facilities	5-10, 10+	Yellow	Green	Yellow	Yellow	Green	Green	Green	Yellow
Spring Hill	N2	3.9 ha	200 dwellings and associated facilities	5-10	Yellow	Green	Yellow	Green	Green	Green	Yellow	Green
STW Works, Edgbaston	S487	3 ha	90 dwellings	5-10	Yellow	Green	Yellow	Yellow	Green	Green	Green	Yellow
Ledsam Street	CC1	3.4 ha	152 dwellings	10+	Yellow	Yellow	Yellow	Yellow	Green	Yellow	Green	Yellow
New Secondary School adjacent to Nelson J&I School	Nelson	0.9 ha	New secondary school (approx. 10,000 sqm)	5-10, 10+	Green	Green	Green	Yellow	Yellow	Yellow	Red	Yellow

# Map of Development Sites



## Delivery and Phasing

A draft masterplan for Greater Icknield has been consulted upon and, when adopted, will be used to guide investment decisions on key sites within the area and realise the vision of delivering the principles of a sustainable neighbourhood. The masterplan will set out a number of principles and will provide further detailed guidance for each of the key sites. This will help increase the degree of planning certainty in the area, and is expected to be adopted in 2014.

Outline planning permission is in place for the Icknield Port Loop site. The City Council and Canal & River Trust are currently setting up a limited liability partnership and will be seeking to appoint a private sector development partner in early 2015 to provide working capital to progress the scheme. Soft market testing of this approach has received a positive response from potential partners. The City Hospital site has the capacity to provide a significant amount of development. The majority of the hospital site is likely to come forward for development with a proposed replacement facility to be built nearby within the boundary of Sandwell MBC. The funding arrangements for the new hospital have been approved by the Treasury, and the new facility is due to open in 2019.

The only site that is anticipated to have a high risk delivery consideration is the proposed secondary school as this is reliant on funding being secured to deliver this proposal. It is anticipated that the bulk of this will come from the development sites within the area that will generate a need for additional education provision. The section 106 agreement for the Icknield Port Loop development includes a contribution towards education provision of at least £1.2m which could rise to £4.35m with overages.

The Dudley Road/Spring Hill Corridor highway improvements are required to accommodate the overall level of growth proposed for the area. They also directly impact on the development of the Spring Hill and City Hospital sites as they both adjoin the Dudley Road. The Birmingham Cycle Revolution proposal will have a particularly beneficial impact on the development of Greater Icknield through contributing to improved connectivity, particularly to the City Centre.



### 4.3 Aston, Newtown & Lozells AAP

#### Spatial Strategy and Opportunities

The adopted AAP supports a regeneration process that will make Aston, Newtown and Lozells a location of choice by creating mixed, balanced and successful communities. Around 1,300 new homes will be built over the plan period across the AAP area. Approximately 5,000 new jobs will be created, of which 3,000 will be as a result of the Aston Regional Investment Site (RIS). The remainder will be generated from the expansion of Perry Barr / Birchfield District Centre, alongside the development of underutilised and derelict sites. Aside from significant housing and employment growth, the AAP also seeks to deliver integrated and sustainable transport networks, quality places, thriving local centres and an enhanced environment and green spaces.

#### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	396	390	<b>786</b>
Office (sqm)	0	10,000	<b>10,000</b>
Retail (convenience and comparison) (sqm)	0	20,000	<b>20,000</b>
Employment Sites (ha)	21.9	0	<b>21.9</b>
Opportunity Site (ha)	0	5	<b>5</b>

## Strategic Infrastructure Requirements

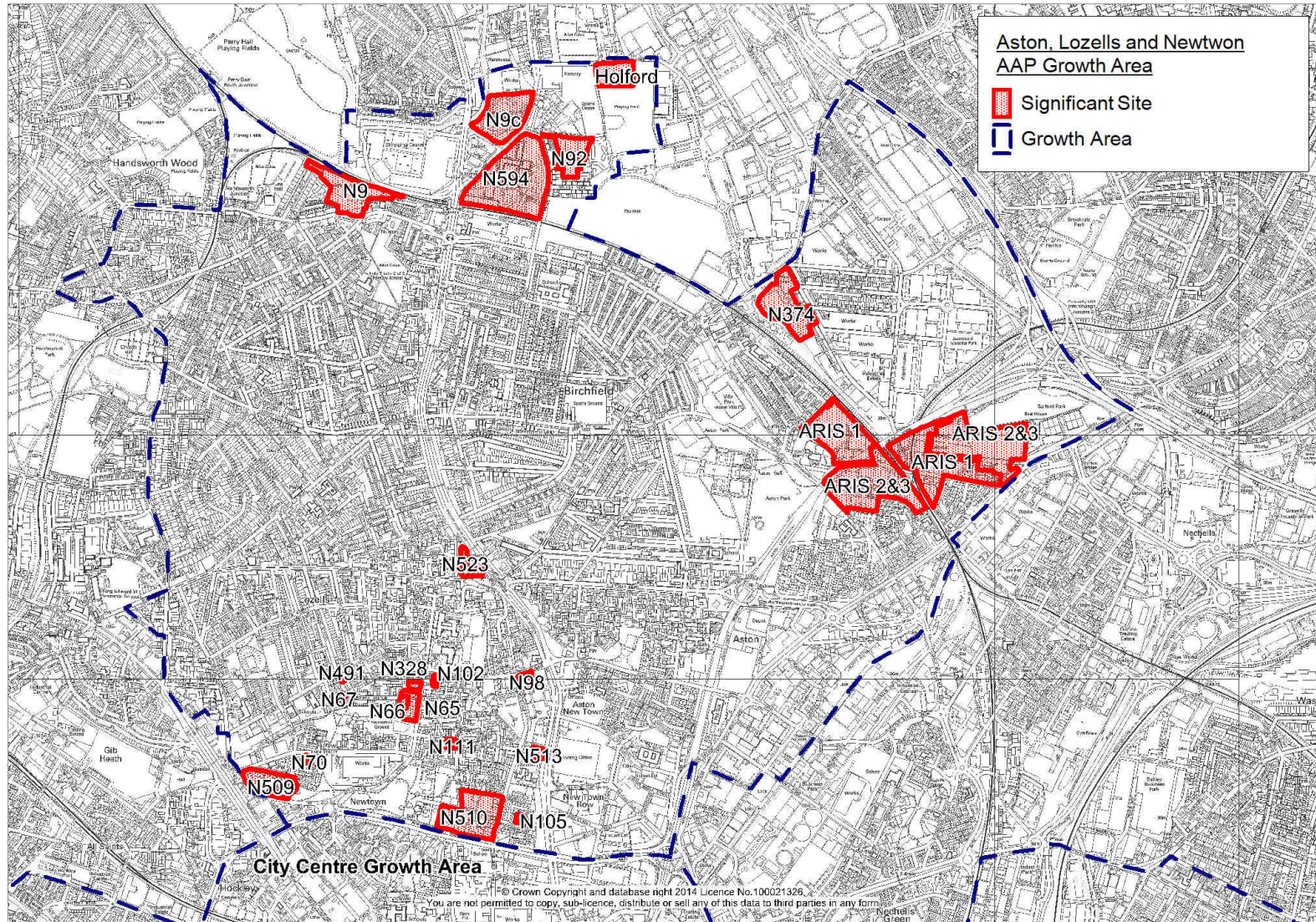
<b>Infrastructure</b>	<b>Status</b>	<b>Total Cost (million)</b>	<b>Delivery Timescale</b>
<b>ENVIRONMENT AND SUSTAINABILITY</b>			
Schemes to Address Flooding	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
<b>HOMES AND NEIGHBOURHOODS</b>			
Aston Newtown and Lozells Area Action Plan (AAP) - Housing Regeneration Programme (Phase 2 & 3)	Funding partly identified	£47m	0-5
<b>ECONOMY AND NETWORK OF CENTRES</b>			
Aston Regional Investment Site – Advanced Manufacturing Hub (Economic Zone)	Funding identified	£8m	0-10+
Food Hub, Perry Barr (Economic Zone)	Proposal	£5m	0-10
<b>CONNECTIVITY</b>			
Perry Barr highway improvement works and public realm	Proposal	£8.6m	0-10
Birmingham- A34 SPRINT	Funding partly identified	£40m	0-5
Perry Barr public transport hub	Proposal	£8m	0-10+
Major road corridors developed as key gateways and green corridors	See Outside the Growth Areas	See Outside the Growth Areas	0-10+

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Land off Witton Road and Tame Road (former Siemens site)	N374	3.3 ha	130 dwellings	5-10	Yellow	Green	Green	Green	Green	Green	Yellow	Green
New John Street West	N510, N509	3.1 ha	100 dwellings	10+	Yellow	Yellow	Yellow	Green	Yellow	Green	Yellow	Yellow
Newtown Areas 2 & 3	N65, 66, 67, 70, 98, 102, 105, 111, 328, 491, 513	2 ha	116 dwellings (net)	5-10+	Green	Yellow	Green	Green	Green	Green	Green	Green
Former Clyde Tower	N523	0.5 ha	50 dwellings	5-10	Green	Green	Green	Green	Green	Green	Green	Green
Aston RIS Phase 1 (Holte and Priory Site/ Serpentine Site)	ARIS 1	10.5 ha	Employment development	0-5	Green	Green	Green	Green	Green	Green	Green	Green
Aston RIS Phase 2 and 3 (Queens Road / Priory Road)	ARIS 2&3	10 ha	Employment development	0-10+	Green	Yellow	Yellow	Green	Green	Green	Green	Yellow
Holford Drive Playing Fields	Holford	1.4 ha	Employment development	0-5	Green	Green	Green	Green	Yellow	Green	Green	Green
Perry Barr Greyhound Stadium	N9c	3.4 ha	Potential to accommodate town centre uses (notional figures of retail 20,000 sqm, office 10,000 sqm for District Centre)	0-10	Yellow	Yellow	Green	Green	Yellow	Green	Yellow	Yellow

Further Capacity Identified in BDP / Evidence												
Wellhead Lane (former bus depot)	N92	1.8 ha	85 dwellings	5-10	Orange	Green	Orange	Green	Green	Green	Orange	Orange
Birmingham City University Teaching Campus, Perry Barr	N594	7.5 ha	Mixed-use scheme - approx. 160 dwellings on part of site with approx. 5ha remaining for other uses (commercial / retail / education)	0-10	Orange	Green	Green	Green	Orange	Green	Green	Green
Wellington Road, Perry Barr	N9	3 ha	145 dwellings	5-10	Orange	Orange	Orange	Orange	Green	Green	Green	Orange

Map of Development Sites



## Delivery and Phasing

The AAP sets out an ambitious agenda for change in Aston, Newtown and Lozells. Some of the more complex and major developments, including the RIS, will be delivered over the life of the plan. The AAP emphasises the importance of partnership working with a wide range of stakeholders and organisations to ensure that sites are brought forward, and how the City Council is prepared to use its compulsory purchase powers where necessary. A number of the key sites, including the RIS, fall within City Council and Homes & Communities Agency ownership, enabling the public sector to use its land to support growth. Compulsory purchase powers are being used to bring forward a wider development proposal as part of Phase 1 of the RIS, and these powers will be applied in later phases.

Significant progress has already been made in respect of housing delivery, and Phase 1 of the RIS is currently being marketed to potential end users, with an occupier secured for part of the site. A package of highway improvement works to support the RIS has been developed, for which funding has been approved and works are due to start on site shortly. Most of the key sites identified in this section as deliverable, although there are moderate risks for some sites including land assembly and contamination.

A Local Development Order (LDO) has been adopted (2014) for part of the Aston RIS, which streamlines and simplifies the planning process by extending permitted development rights for industrial uses (B1 (b), B1 (c) and B2), thereby reducing costs and lead in times for developers and providing certainty to the market. To date, funding has been secured from the Growing Places Fund for site acquisitions and the package of highway works referred to above.

A Masterplan is proposed for Perry Barr District which will mainly focus on a number of strategic development sites and potential land use options, alongside improvements to the highway network and public realm. The key development sites include the BCU teaching campus (which will be largely vacated by September 2015) and Perry Barr Stadium. The masterplanning exercise will explore appropriate land uses, including commercial and residential uses as identified in the adopted AAP and BDP policy, and where these uses are best placed in urban design terms. The Perry Barr public transport hub, which features in Centro's programme of projects, will be key to the regeneration of this area, and funding opportunities for this project are currently being explored.

The City Council is continuing a programme of regeneration for the Newtown Housing Regeneration Area, which will create a high quality environment by building new aspirational housing, improving existing stock, making better connected and more attractive streets and green spaces. As the Regeneration Area falls within Hockley Brook flood zone, mitigation measures have been identified to enable development to be brought forward over the plan period, for which funding has been partly secured.

#### 4.4 Sutton Coldfield

##### Spatial Strategy and Opportunities

Sutton Coldfield Town Centre has development capacity for 30,000 sqm retail floorspace, 20,000 sqm office floorspace, and 450 dwellings. It is the largest centre in Birmingham outside of the City Centre and has a sub-regional role. To address concerns of the Centres under performance, the Sutton Coldfield Town Centre Regeneration Framework SPD (adopted in 2009) provides a vision and strategy for rejuvenating the Town Centre. It proposes significant mixed-use retail and office development taking place within the Centre to provide a substantially improved offer. This strategy is embedded within the Birmingham Development Plan and will be taken forward over the plan period.

##### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	0	450	<b>450</b>
Office (sqm)	0	20,000	<b>20,000</b>
Retail (convenience and comparison) (sqm)	0	30,000	<b>30,000</b>

## Strategic Infrastructure Requirements

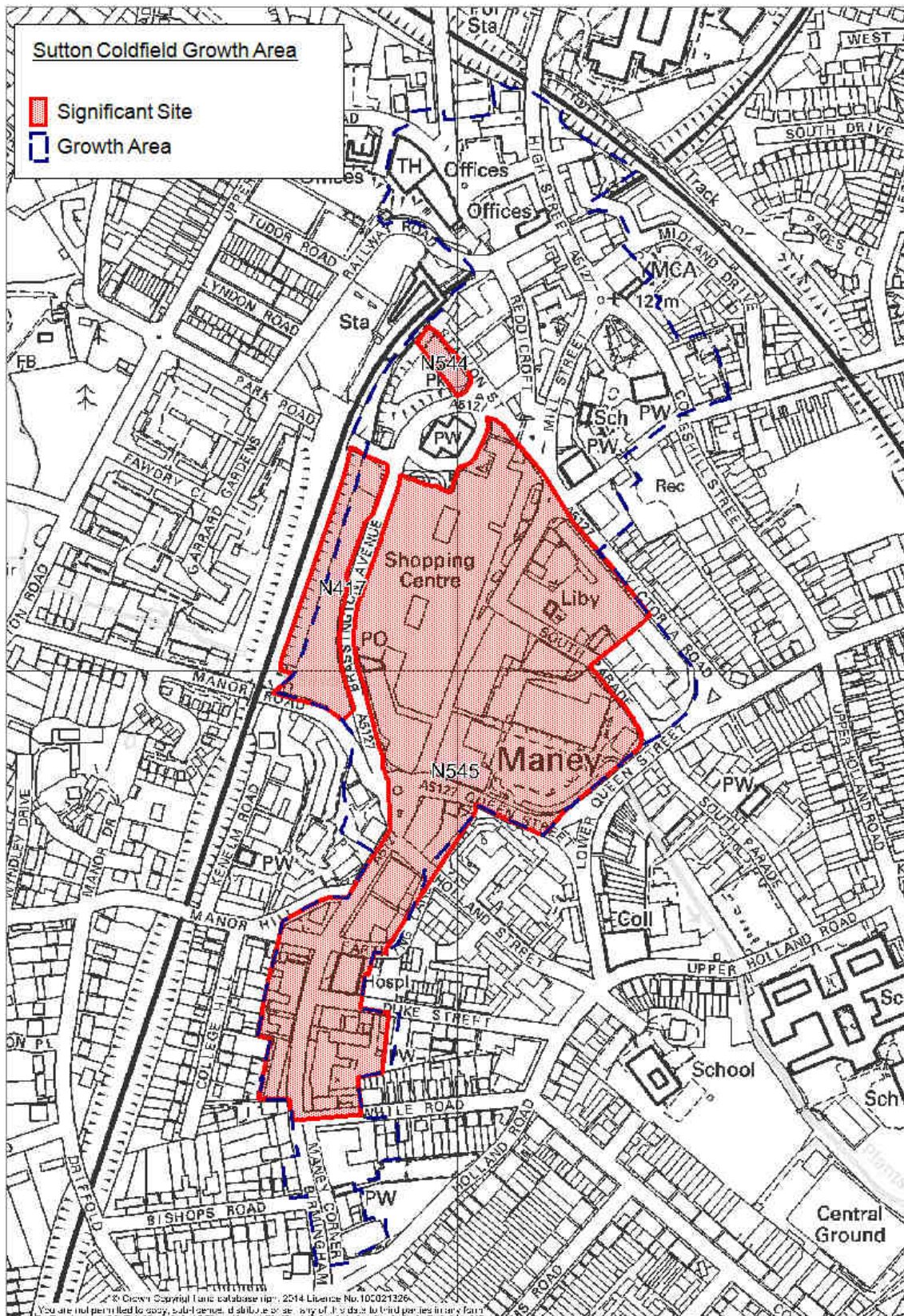
<b>Infrastructure</b>	<b>Status</b>	<b>Total Cost (million)</b>	<b>Deliver Timescale</b>
<b>CONNECTIVITY</b>			
Sutton Boulevard (Birmingham Road)	Proposal	£5m	0-5
Sutton Coldfield Relief Road	Proposal	£6.7m	0-10+
Highway and Transportation Improvements 3 schemes: Holland Road / Lower Queen Street corridor; Birmingham Road / Queen Street / Brassington Avenue junction improvement; Birmingham Road / Jockey Road junction improvement	Proposal	£4m	0-10
Tamworth / Sutton Park Line / Camp Hill Chords and diversion of Leicester services and Camp Hill line local services / Enhanced local service provision / Moor Street increased passenger handling capacity	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
Public transport interchange	Proposal	£5m	0-5
Increased park and ride capacity on the Cross City Line	Proposal	TBC	0-10+
A38 Sutton Coldfield Bypass (maintenance)	Proposal	£3.45m	5-10



Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall is the site considered deliverable?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
None												
<b>Further Capacity Identified in BDP / Evidence</b>												
Sutton Coldfield Town Centre Primary Shopping Area	N545	11 ha	30,000 sqm of retail, 20,000 sqm of offices and 150 dwellings	0-10+								
Brassington Avenue	N417	1.2 ha	240 dwellings	0-5, 5-10								
Station Street / Brassington Avenue Sutton	N544	0.2 ha	60 dwellings	10+								

# Map of Development Sites



## Delivery and Phasing

The main policy tool for delivering the sites within Sutton Coldfield Town Centre is the Sutton Coldfield Town Centre Regeneration Framework SPD. This sets out a number of key delivery themes that future development of the Town Centre should follow and provides an indicative masterplan showing how approximately 30,000 sqm gross of retail floorspace (including an element of cafes and restaurants), 6,000 sqm of offices and 245 new homes could be accommodated, with delivery by 2021. This also incorporates other possible developments including a new library, hotel/conference centre and bus interchange. It should be noted that higher level of development proposed in the BDP reflects the longer delivery period of the plan. It is anticipated that as the economy improves that development will come forward once access to development finance improves given the significant potential of Sutton Coldfield Town Centre.

While Sutton Coldfield Town Centre has considerable potential, deliverability continues to be constrained by land ownership issues. The scale of the opportunity presented by the Town Centre and the potential for creation of an even larger catchment through other development proposals in the BDP mean that it is anticipated that widespread transformation of the Town Centre will take place during the plan period. As a last resort the City Council will, if necessary, explore the option of Compulsory Purchase Orders where necessary to enable site assembly.

A further issue is the need for substantial investment in infrastructure to improve the wider connectivity and efficiency of the Town Centre. Delivery of the Sutton Coldfield Relief Road will significantly improve the flow of traffic, increasing the likelihood of redevelopment proposals coming forward. Likewise the proposed Public Transport Interchange and potential reopening of the Sutton Park freight line to passenger rail will improve accessibility, widening the catchment and improving the conditions for substantial redevelopment. These proposals will be progressed through partnership working with Centro and Network Rail. Finally, the Sutton Coldfield Boulevard and associated highway and transport improvement schemes will create the conditions for a refocusing of the offer along Birmingham Road towards a more café/restaurant led commercial area, further improving the offer of the Town Centre.

#### 4.5 Langley Sustainable Urban Extension

##### Spatial Strategy and Opportunities

Land to the west of the A38 at Langley will be developed as a sustainable urban extension of approximately 6,000 new homes (5,000 within the plan period) to meet the needs of the City's growing population. The development will achieve the highest standards of design and sustainability and a network of green spaces including a green link to New Hall Valley Country Park. A range of supporting facilities will be provided including new schools and other services together with significant improvements in the local highway infrastructure and public transport services.

##### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	0	5,000	<b>5,000</b>

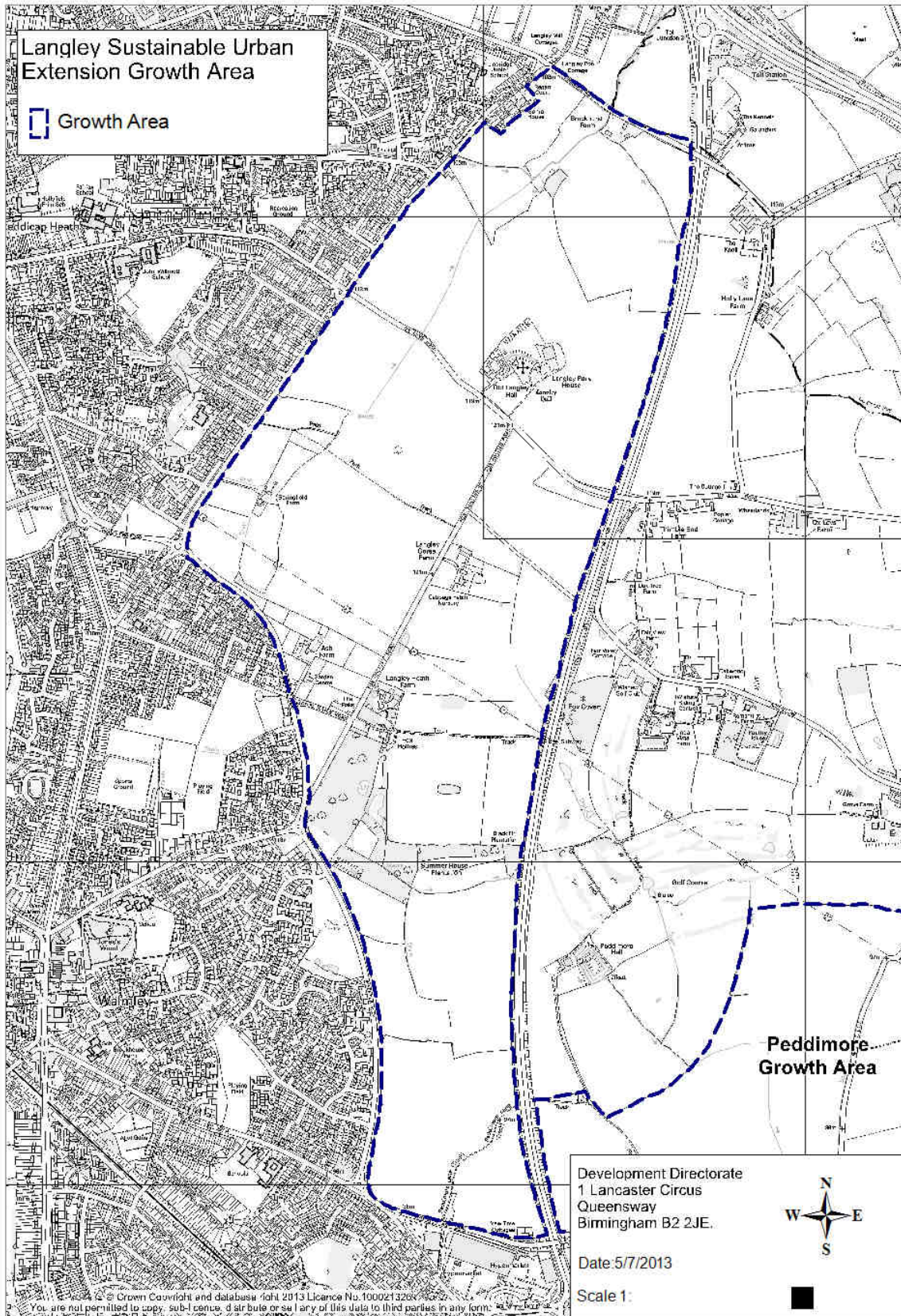
## Strategic Infrastructure Requirements

<b>Infrastructure</b>	<b>Status</b>	<b>Total Cost (million)</b>	<b>Delivery Timescale</b>
<b>ENVIRONMENT AND SUSTAINABILITY</b>			
Play facilities, local public open space and allotments	Proposal	TBC	0-10+
<b>HOMES AND NEIGHBOURHOODS</b>			
Early years provision, primary schools and 1 secondary school	Proposal	TBC	0-10+
<b>ECONOMY AND NETWORK OF CENTRES</b>			
Local centre uses and public realm (including shops, business, health, pubs, cafes and community buildings)	Proposal	TBC	0-10+
<b>CONNECTIVITY (Projects also relate to Peddimore)</b>			
Direct / indirect highway improvements (including M42, Junction 9)	Proposal	£34.6m	0-10+
Public transport provision (bus)	Proposal	£20.8m	0-10+
Walking and cycling improvements	Proposal	£12.1m	0-10+
Tamworth / Sutton Park Line / Camp Hill Chords and diversion of Leicester services and Camp Hill line local services / Enhanced local service provision / Moor Street increased passenger handling capacity	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
A38 Sutton Coldfield Bypass (maintenance)	Proposal	£3.45m	5-10

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
None												
<b>Further Capacity Identified in BDP / Evidence</b>												
Langley Sustainable Urban Extension	N646	273 ha	5,000 dwellings in plan period (although capacity for 6,000)	0-10+								

# Map of Development Sites



## Delivery and Phasing

The Sustainable Urban Extension (SUE) at Langley is a strategic Green Belt release of land proposed by the Birmingham Development Plan. Delivery is anticipated to be achievable in the plan period. However, the capacity of the site means that it is unlikely that the development will be fully completed within the plan period. It is anticipated that land will remain for housing development post 2031.

All the land is being actively promoted by a consortium of developers and no significant constraints to development have been identified. There are identified delivery issues, including impacts on ecology, archaeology and the historic environment. However the risks these pose are considered manageable and can be adequately minimised by design or mitigation.

The provision of infrastructure will be important to the delivery of the SUE, with supporting facilities such as schools, health care facilities, public open space and sports facilities needed to be an integral part of the development. In addition, strategic transport improvements will be needed to enable the delivery of the site, including access to the A38 and enhanced public transport connections to Sutton Coldfield, Birmingham City Centre and other areas. It is anticipated that this infrastructure will be funded by developer contributions; however the exact mechanism will be determined through a future viability assessment. Further details are provided in the IDP.

A Supplementary Planning Document, including a masterplan and Design Code for Langley SUE will be prepared to guide development. The phasing of development will be considered in this document in conjunction with the development of Peddimore (adjoining the SUE to the east). A range of public sector partners will be involved in the delivery of the SUE including Centro, Network Rail, and the Highways Agency.



## 4.6 Peddimore

### Spatial Strategy and Opportunities

A high quality employment site of 80 hectares is proposed at Peddimore, Minworth. The site, which will be removed from the Green Belt, is required to meet the shortfall in best urban employment land. Approximately half of the site will be safeguarded to meet the needs of large manufacturing users. Providing high quality employment land to meet the needs of the expanding growth sectors is essential in supporting the economic prosperity of the City.

### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Employment (ha)	0	80	<b>80</b>

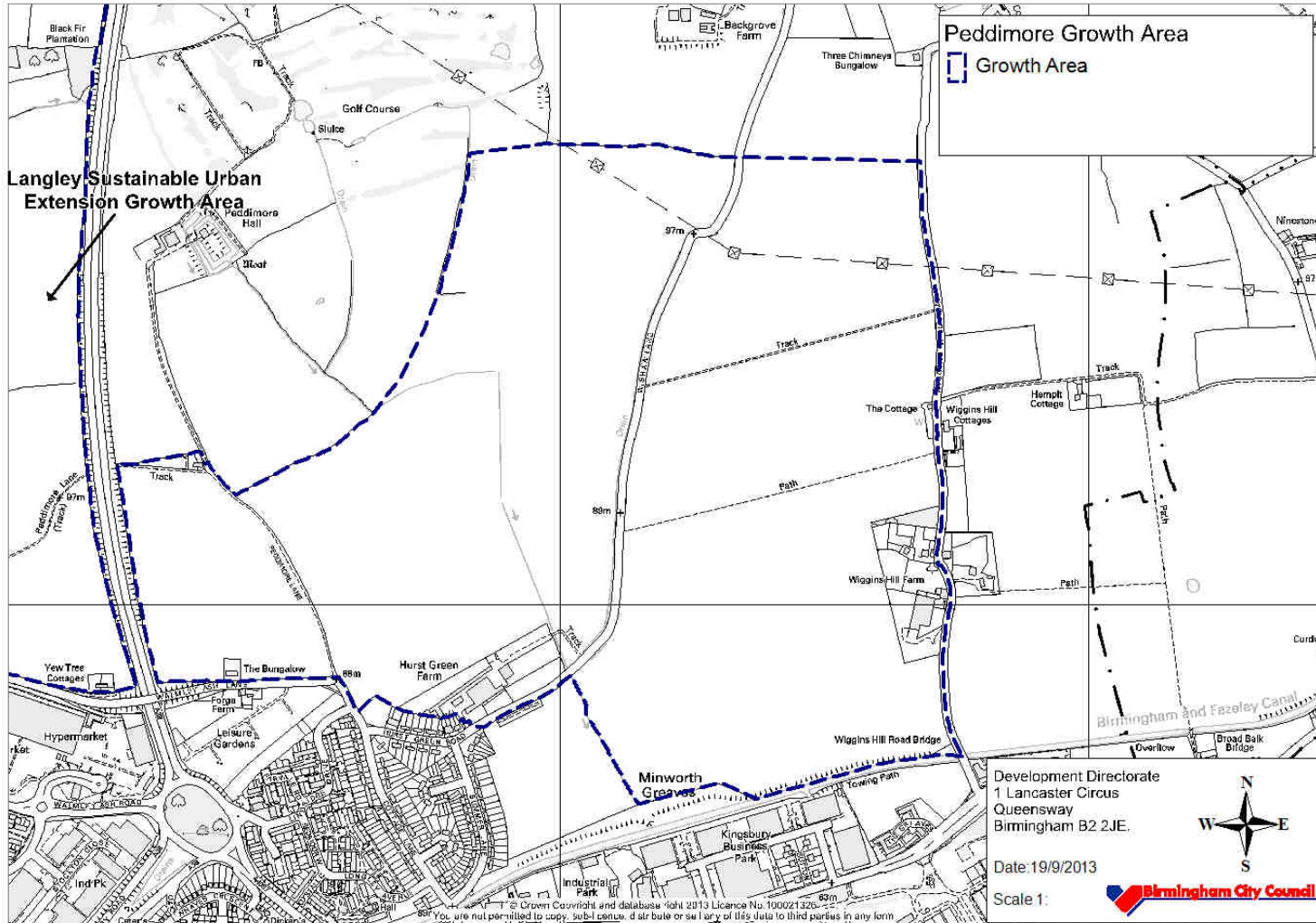
Strategic Infrastructure Requirements

Infrastructure	Status	Total Cost (million)	Delivery Timescale
<b>ENVIRONMENT AND SUSTAINABILITY</b>			
Landscape enhancements to mitigate the effects of development	Proposal	TBC	0-10+
<b>CONNECTIVITY (projects also relate to Langley SUE)</b>			
Highway improvements (including Kinsbury Road / Cottage Lane junction improvements)	Proposal	Included in costs for Langley SUE	0-10+
Public transport provision (bus)	Proposal		0-10+
Walking and cycling improvements	Proposal		0-10+
Tamworth / Sutton Park Line / Camp Hill Chords and diversion of Leicester services and Camp Hill line local services / Enhanced local service provision / Moor Street increased passenger handling capacity	See Outside the Growth Areas	See Outside the Growth Areas	0-10+

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
None												
<b>Further Capacity Identified in BDP / Evidence</b>												
Peddimore	Growth Area	80 ha	Employment development	0-10+								

Map of Development Sites



## Delivery and Phasing

The development of Peddimore will make a significant contribution towards the provision of large scale opportunities for employment development. It is a strategic Green Belt release of land proposed by the Birmingham Development Plan. Delivery is anticipated to be achievable in the plan period.

The majority of the area is under the ownership of Birmingham City Council. No significant delivery issues have been identified. There are identified delivery issues, including impacts on ecology, archaeology and the historic environment. However the risks these pose are considered manageable and can be adequately minimised by design or mitigation.

The provision of infrastructure will be important to the delivery of the Peddimore site, principally strategic transport (including access to the A38) and landscape improvements. It is anticipated that this infrastructure will be funded by developer contributions; however the exact mechanism will be determined through a future viability assessment. Further details are provided in the IDP.

A masterplan will be prepared to guide development to address issues of design, access and phasing to ensure a comprehensive development. The phasing of development at Peddimore will be considered in conjunction with the development and infrastructure provision on the SUE to the west. A range of public sector partners will be involved in the delivery including Centro, Network Rail, and the Highways Agency.

## 4.7 Bordesley Park AAP

### Spatial Strategy and Opportunities

The vision for Bordesley Park is a revitalised neighbourhood delivering growth within a high quality environment. Key objectives include delivering new homes, jobs, and access to a range of improved training, educational, community and leisure facilities. The Bordesley Park AAP area has the capacity to accommodate approx. 750 dwellings and create 3,000 jobs. The development opportunities are set out in the emerging AAP which will promote the opportunities, help secure funding and developer interest, and guide new development on the ground.

### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	0	226	<b>226</b>
Employment Sites (ha)	0	24.8	<b>24.8</b>

## Strategic Infrastructure Requirements

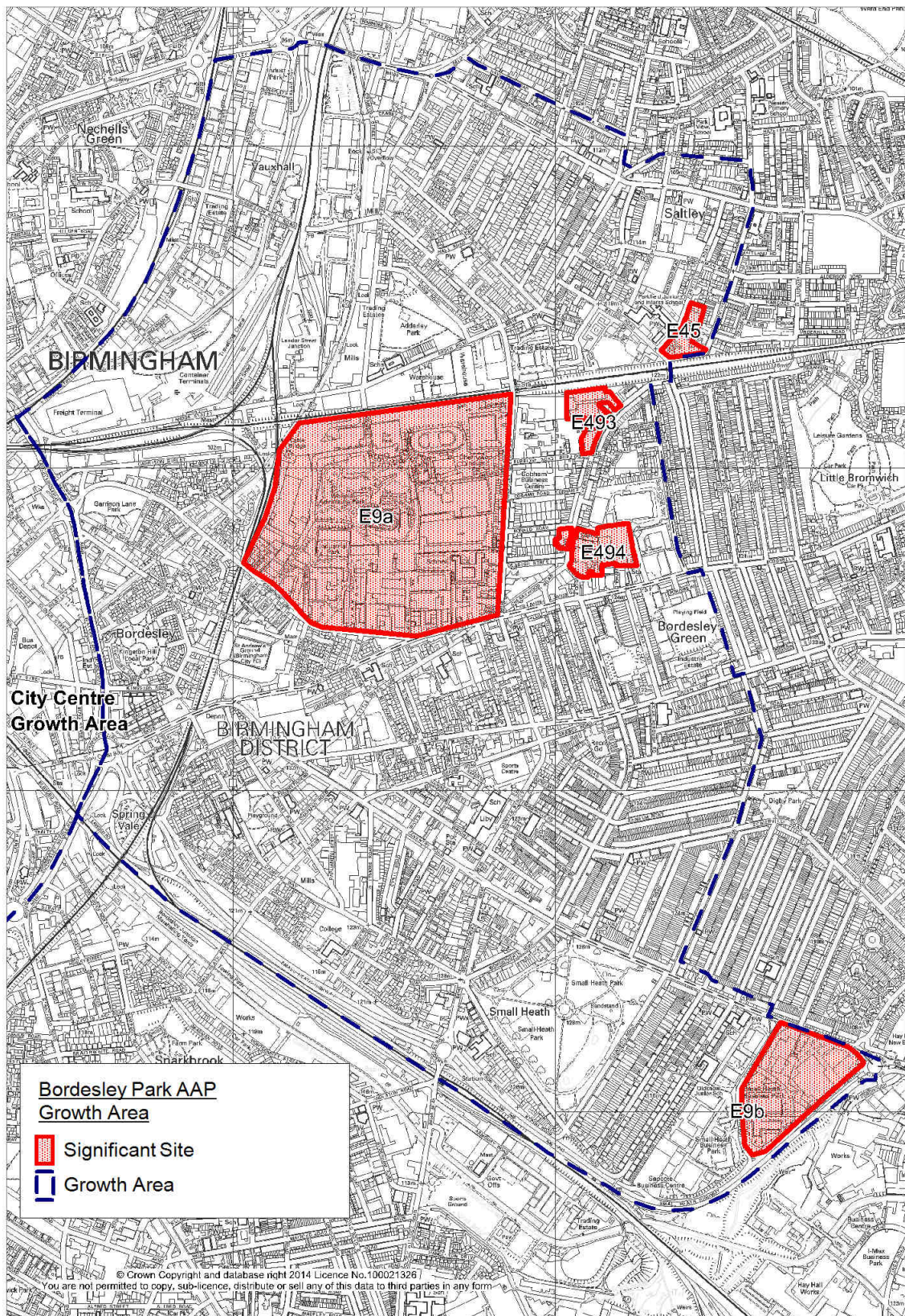
<b>Infrastructure</b>	<b>Status</b>	<b>Total Cost (million)</b>	<b>Delivery Timescale</b>
<b>ECONOMY AND NETWORK OF CENTRES</b>			
Highway and junction improvements, improvements to Adderley Park Station, land remediation and general services, local centres, environmental enhancements and green infrastructure	Proposal	£48m	5-10+
<b>CONNECTIVITY</b>			
Birmingham Ring Road project, including five junction improvements – Bordesley, Holloway, Haden, Curzon and Ashted Circus	See City Centre	See City Centre	0-5
Birmingham Cycle Revolution	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
Eastern corridor / A45 Rapid Transit	See Outside the Growth Areas	See Outside the Growth Areas	5-10+
Eastside (City Centre) to Birmingham Airport (HS2 Interchange) – Rapid Transit / SPRINT	See Outside the Growth Areas	See Outside the Growth Areas	10+
Major road corridors developed as key gateways and green corridors	See Outside the Growth Areas	See Outside the Growth Areas	0-10+

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
None												
<b>Further Capacity Identified in BDP / Evidence</b>												
Cherrywood Road, Bordesley Green	E493	1.6 Ha	66 dwellings	5-10	Yellow	Green	Yellow	Yellow	Green	Green	Yellow	Green
Humpage Road / Cherrywood Road, Bordesley Green	E494	2.7 Ha	106 dwellings	5-10	Yellow	Green	Yellow	Yellow	Green	Green	Yellow	Green
Parkfield Road / Anthony Road	E45	1.1 Ha	54 dwellings	5-10	Red	Yellow	Yellow	Yellow	Green	Green	Yellow	Yellow
Wheels, Venetia Road, Nechells	E9a	15.2 Ha	Employment development	5-10+	Red	Yellow	Green	Yellow	Yellow	Yellow	Red	Yellow
Small Heath Business Park, Coventry Road	E9b	9.6 Ha	Employment development	0-10+	Green	Green	Yellow	Yellow	Green	Green	Green	Green



# Map of Development Sites



## Delivery and Phasing

The main action to achieve long term growth is through the Bordesley Park AAP. During Summer / Autumn 2013, consultation on the Preferred Options document and related detailed discussions have taken place with a wide range of land owners, occupiers, businesses, developers and other interested parties. It is considered that the AAP will provide wider confidence in the area to support inward investment.

There has already been significant recent development in the area, including new housing, retail and education and community facilities. This is particularly evident in Saltley close to the Parkfield Road site where new housing, open space and health facilities have been delivered.

The Wheels site and sites in Cherrywood Road have some significant delivery considerations as they have a long history of either brick works followed by landfilling or other industrial uses. It is recognised that the resolution of ground condition issues may be challenging and further investigations will need to take place as development proposals are brought forward. The delivery of some proposals will require new site specific infrastructure – the development of the Wheels site will require a new access road through the site. Further detailed guidance will be prepared for individual sites as required and existing close working with owners of sites will continue. The delivery of strategic infrastructure, in particular site specific requirements, transport and local centre improvements, will support the long term growth of the area.

To enable development, any necessary relocations will be handled sensitively and options to safeguard affected businesses and other activities will be considered.

Partners will include BCC/HCA/private sector/local residents and businesses/Centro/schools and colleges/community groups and organisations.

## 4.8 Eastern Triangle

### Spatial Strategy and Opportunities

The Eastern Triangle offers development opportunities for over 1,000 dwellings, 15,000 sqm retail floorspace and 5,000 sqm office floorspace. The Meadway, Stechford and Shard End areas are the main focus to deliver positive change in the area, which will complement previous successful regeneration in the area.

The Meadway is a major opportunity to provide new housing, an improved / redeveloped local centre, and a reconfiguration and improvement of the existing Kent's Moat Recreation Ground. The site is on the line of one of east Birmingham's potential rapid transit routes.

Stechford has the potential to become a new sustainable neighbourhood delivering new housing, improved transport infrastructure and connections, and environmental improvements. This will include an improved relationship with the adjoining Cole Valley linear open space.

There is potential for the former Yardley Sewage Works to be developed and provide up to 300 new homes (policy GA8 of the BDP proposes that the site is released from the Green Belt). Development will be expected to provide a high quality housing environment that will deliver wider housing choice in Shard End as well as associated community facilities. A key feature of the development will be improvements to the Cole Valley – both in terms of pedestrian access but also in terms of amenity, landscaping and other facilities.

### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	0	663	<b>663</b>
Office (sqm)	0	5,000	<b>5,000</b>
Retail (convenience and comparison) (sqm)	0	15,000	<b>15,000</b>
Employment Sites (ha)	0	9.4	<b>9.4</b>

### Strategic Infrastructure Requirements

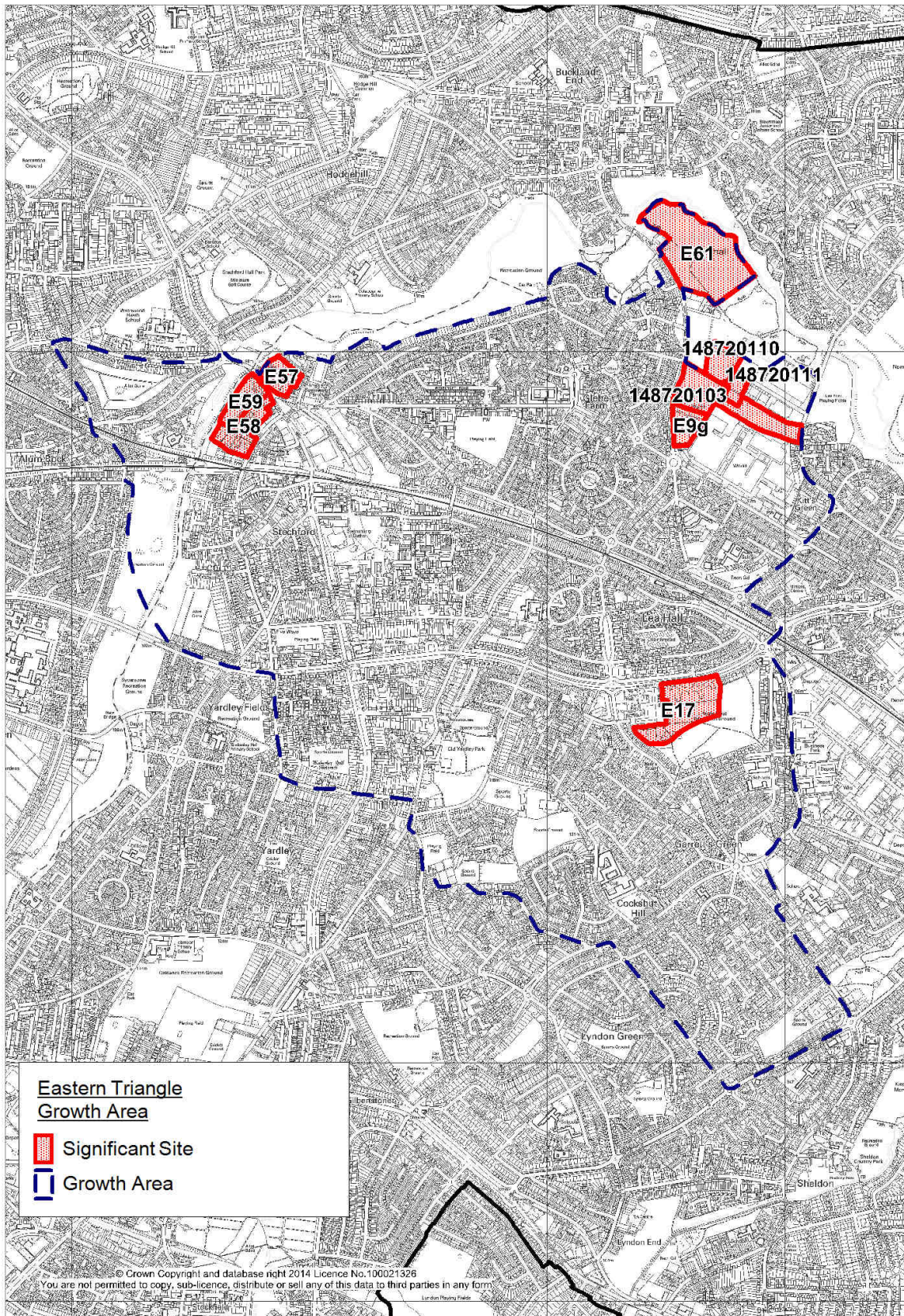
Infrastructure	Status	Total Cost (million)	Delivery Timescale
<b>HOMES AND NEIGHBOURHOODS</b>			
Iron Lane, Stechford	Proposal	£9.5m	0-10
Meadway highway works, Lea Hall station improvements and recreation ground improvements	Proposal	£10m	0-10
Redevelopment of former Yardley Sewage Works	Proposal	£6.5m	5-10
Eastern corridor / A45 Rapid Transit	See Outside the Growth Areas	See Outside the Growth Areas	5-10+

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
None												
<b>Further Capacity Identified in BDP / Evidence</b>												
Poolway Shopping Centre & Meadway	E17	7 ha	Local Centre development – notional capacity of up to 15,000 sqm retail and 5,000 sqm office	5-10+								
			175 dwellings (30 dwellings net) with reconfigured and improved open space.	0-5, 5-10								
B&Q and adjacent land, Station Road	E58 & E59	4.8 ha	243 dwellings	5-10								
Former Bulls Head Allotments & former Manor House Public House, Station Road	E57	1.7 ha	90 dwellings	5-10								

Former Yardley Sewage Works, Cole Hall Lane, Shard End	E61	8.5 ha	300 dwellings	0-5, 5-10	Red	Green	Yellow	Yellow	Yellow	Yellow	Yellow	Red	Yellow
Land between Cole Hall Lane and Lea Ford Road / Yardley Brook Ind Est	148720110 148720103 148720111	8.1 ha	Employment development	0-5	Yellow	Green	Green	Green	Green	Green	Green	Yellow	Green
Former Bus Garage Crossfield Road, Shard End	E9g	1.3 Ha	Employment development	0-5	Green	Green	Yellow	Yellow	Green	Green	Yellow	Green	Green

# Map of Development Sites



## Delivery and Phasing

The delivery of growth in the area will rely on a number of key sites being delivered:

- Meadway

The key site in this area is the Poolway Shopping Centre and Meadway development. Consultation events have explored initial housing development opportunities. Soft market testing has assessed developer interest in the site and this has been accompanied by an assessment of economic viability. Further design feasibility is being undertaken and this will be followed by further local consultation. The site is identified as requiring strategic infrastructure to enable it to come forward.

Additional development guidance will be prepared to bring the opportunities forward and secure developer interest. This is likely to be through a two stage tender process. Key issues include:

- Scale of different ownerships and the potential need for compulsory acquisition
- Scale of demolition affecting existing residents and businesses
- The funding gap

A number of local sites have already been brought forward for residential development in the wider area and these have contributed to improving the image of the area for further investment.

Partners will include BCC/HCA/Private Sector/local residents and businesses/Centro

- Stechford

There are a number of sites in this area that have potential for residential development. Preparatory work has been undertaken on a SPD to give additional development guidance to that contained in the BDP, and this included discussions with land owners and local Councillors. In terms of specific sites, the former allotments are in City Council ownership and will be brought forward through the Birmingham Municipal Housing Trust. The B&Q site and adjoining sites are in private ownership and there are ongoing discussions with owners to enable their delivery.



The delivery of highway improvements will help to unlock development and is a key infrastructure requirement for the area, particularly the Iron Lane / Flaxley Road and Station Road junction (the funding for this has recently been secured through the Local Growth Fund).

- Shard End

There has been considerable local investment in nearby regeneration projects including the redevelopment of the Bucklands End Estate and the redevelopment of Shard End Crescent Local Centre to provide a new local centre and housing. Cole Hall Lane has been improved with a new road bridge provided over the River Cole.

The majority of the former Yardley Sewage Works is in City Council ownership and the site is allocated for development in the BDP. In terms of delivery, there is an ongoing assessment of ground conditions and discussions are taking place with specialist remediation contractors. The site will require new access roads and environmental, pedestrian and cycling improvements. Initial design feasibility work is exploring options for development, and the site is identified as strategic infrastructure for the area. It is likely that potential development partners will be selected through market testing and a two-stage tender process.

Partners will include BCC/HCA/Private sector/Yardley and District Rugby Club/local residents

## 4.9 Selly Oak and South Edgbaston

### Spatial Strategy and Opportunities

The Selly Oak/South Edgbaston area has the potential for 700 dwellings, 30,000 sqm retail floorspace, and 5ha of employment sites (including office floorspace). The area will be transformed into a thriving area with a mix of new high quality retail, research, healthcare, educational, residential and other uses. It is anticipated that the area around Battery Park (including the Birmingham Battery site) will provide the strategic catalyst for investment in this area. Other significant sites include the former Selly Oak Hospital site, key sites within Selly Oak Centre, and the Queen Elizabeth Hospital campus.

The main development opportunities are:

- Investment into Selly Oak District Centre to bring in new retail uses and revitalise the high street and adjacent sites.
- Creation of an Economic Regeneration Zone for new medical technology development, to expand the city's high value added growth sectors, increasing employment prospects and prosperity.
- Continued investment in hospitals and the University, to provide world class research, teaching and healthcare.
- Major new housing schemes and improvements to the residential environment.

### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	650	0	<b>650</b>
Student (bed spaces)	694	0	<b>694</b>
Office (sqm)	1,500	0	<b>1,500</b>
Retail (convenience and comparison) (sqm)	1,500	30,000	<b>31,500</b>
Employment Sites (ha)	4	1	<b>5</b>
Other (ha)	43	0	<b>43</b>
Opportunity Sites (ha)	0	2.6	<b>2.6</b>

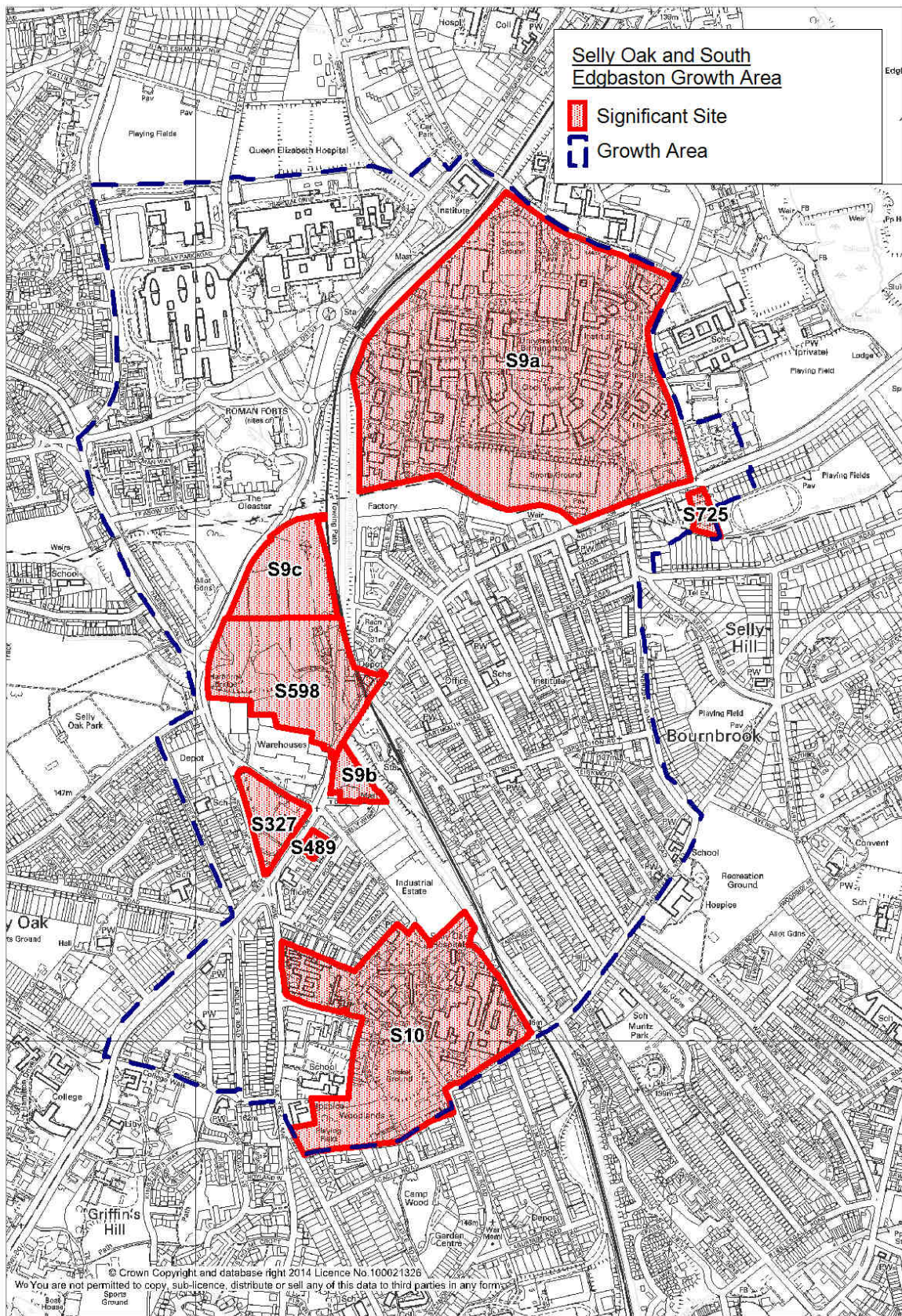
Strategic Infrastructure Requirements

<b>Infrastructure</b>	<b>Status</b>	<b>Total Cost (million)</b>	<b>Delivery Timescale</b>
<b>ECONOMY AND NETWORK OF CENTRES</b>			
Life Sciences Campus (Economic Zone)	Proposal	£5m	0-10
Selly Oak Centre Environmental Improvements	Funding partly identified	£2.5m	5-10
<b>CONNECTIVITY</b>			
Selly Oak New Road (Phase 1B)	Proposal	£6.2m	0-5
University Station Improvements	Funding partly identified	£3.1m	0-5

Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Selly Oak Hospital	S10	17.7 ha	Mixed Use incl 650 new homes, 1,500 sqm retail floorspace, 1,500 sqm office floorspace	0-5, 5-10, 10+	Yellow	Green	Yellow	Green	Green	Green	Green	Green
778-798 Bristol Road	S489	0.2 ha	52 student bedspaces	0-5	Yellow	Green	Green	Green	Green	Green	Green	Green
University of Birmingham	S9a	43 ha (whole site)	Enhanced university facilities	0-5, 5-10	Green	Green	Green	Green	Green	Green	Green	Green
Former West Midlands Ambulance Station, Bristol Road	S725	0.4 ha	259 student bedspaces	0-5	Green	Green	Green	Green	Green	Green	Green	Green
Life Sciences Campus	S9c	4ha	Life sciences campus (includes office floorspace)	5-10	Green	Green	Green	Green	Green	Green	Green	Green
<b>Further Capacity Identified in BDP / Evidence</b>												
The Dingle	S9b	1 ha	Opportunity site - potential to accommodate a range of uses.	0-5	Yellow	Green	Yellow	Green	Green	Green	Green	Green
Battery Site	S598	8.4 ha	Mixed use, including 30,000 sqm retail floorspace, 383 student bedspaces and potentially other uses.	0-5, 5-10	Green	Green	Green	Green	Green	Green	Green	Green
The Triangle	S327	1.6 ha	Opportunity site – potential to accommodate a range of uses.	5-10	Yellow	Green	Yellow	Green	Yellow	Yellow	Yellow	Yellow

# Map of Development Sites



## Delivery and Phasing

It is anticipated that a Supplementary Planning Document will be produced to provide a more detailed and co-ordinated approach to development in this Growth Area.

Outline planning permission has been granted for redevelopment of the former Selly Oak Hospital site for 650 dwellings and other uses including retail (A1, A3 and A4) and Class B1(a)/Class A2, together with access, associated public open space, roads, car parking and landscaping.

Outline planning permission has also been granted (November 2013) for the Life Sciences and Battery Sites to include retail floorspace, Class B floorspace, D2 leisure, student accommodation, petrol filling station, a linear open space walkway 'greenway', vehicular access, car parking, landscaping, retaining walls, and associated works including demolition of existing buildings. The remediation of the site has started.

Other sites including The Dingle and the Triangle will follow on, and these developments will contribute to meeting the spatial strategy for the area. The Council is working closely with developers and other partners in the area, including the University of Birmingham, to deliver development.

#### 4.10 Longbridge AAP

##### Spatial Strategy and Opportunities

The redevelopment of the former MG Rover car plant at Longbridge in south west Birmingham is the largest regeneration scheme in the West Midlands encompassing 190 hectares. Following the closure of the MG Rover in 2005, Birmingham City Council in association with Bromsgrove District Council, Worcestershire County Council, Advantage West Midlands and the principal landowner St Modwen Properties PLC prepared the Longbridge Area Action Plan to secure the comprehensive regeneration of this strategically important brownfield site. The AAP was adopted in 2009 and sets out detailed proposals to transform the site and play a significant role in the future evolution of the West Midlands economy with the provision of a major Regional Investment Site (RIS) and more recently an Economic Growth Zone to support the clustering of high growth sectors at ITEC park.

The area will provide a sustainable employment-led mixed use scheme integrating strong environmental standards and featuring:

- A mixed use local centre;
- New employment including a 25 hectare Regional Investment Site and ITEC Park to provide around 10,000 jobs;
- High quality sustainable housing to provide a minimum of 1450 dwellings with a target of 35% affordable homes;
- Improved access to and movement around Longbridge, environmental, open space improvements and other social / economic benefits.

##### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	587	260	<b>847</b>
Office (sqm)	6,800	0	<b>6,800</b>
Retail (convenience and comparison) (sqm)	19,084	0	<b>19,084</b>
Employment Sites (ha)	25	0	<b>25</b>

## Infrastructure Requirements

The AAP has been subject to detailed viability modelling, which highlights that there is a current gap in scheme viability of approximately £30m based upon Net Present Value. In order to bridge this 'viability gap' public investment is required up front to assist in match-funding developer's investment and kick-starting key phases of the project. In summary, there is a specific need to focus public investment upon:

- Supporting the early delivery of a series of large infrastructure works - road junction improvements and highway and engineering works.
- Supporting the further implementation of the RIS by tackling some of the high upfront physical infrastructure costs, including the provision of site access roads, a strategic transport corridor and major environmental improvements (including the opening-up of an existing river course)

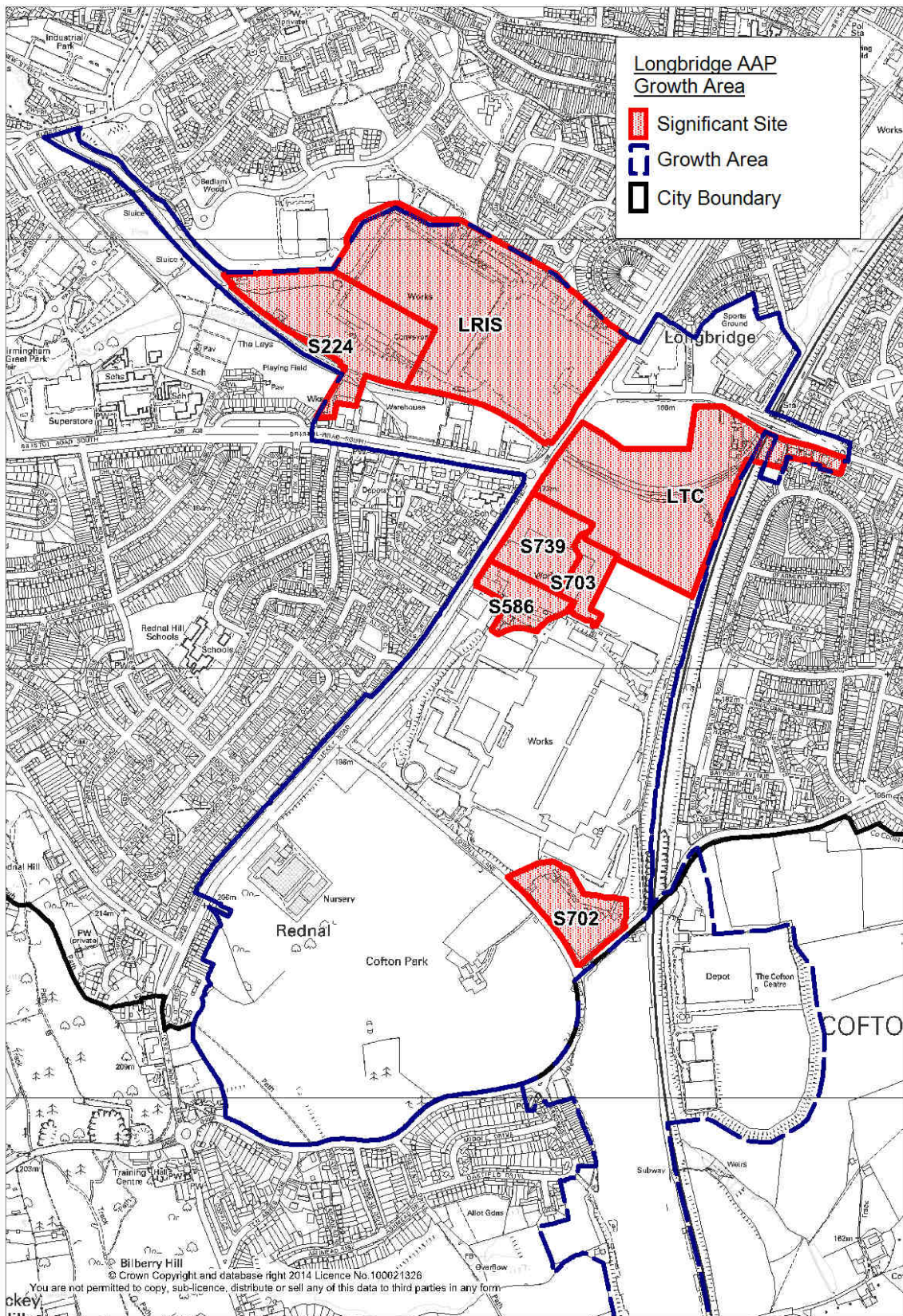
<b>Infrastructure</b>	<b>Status</b>	<b>Total Cost (million)</b>	<b>Delivery Timescale</b>
<b>ENVIRONMENT AND SUSTAINABILITY</b>			
Schemes to Address Flooding	See Outside the Growth Areas	See Outside the Growth Areas	0-10+
<b>ECONOMY AND NETWORK OF CENTRES</b>			
Longbridge Area Action Plan – a new local centre, education provision, housing growth, ITEC Park (Economic Zone)	Proposal	£20m	0-10+
<b>CONNECTIVITY</b>			
Longbridge Connectivity Package	Funding partly identified	£8.2m	0-10+
Longbridge Highway Improvements (inc Highways Agency scheme)	Funding partly identified	£6m	0-5



Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
West Works, Longbridge	S224	7.5 ha	350 dwellings	5-10, 10+	Yellow	Green	Green	Yellow	Yellow	Green	Green	Green
Longbridge RIS	LRIS	25 ha	Employment development	5-10	Yellow	Green	Green	Yellow	Yellow	Green	Green	Green
Longbridge Town Centre	LTC	16.7 ha	Local centre (part already delivered), with further town centre development which will address outstanding comparison retail and office requirements	0-10	Green	Green	Green	Green	Green	Green	Green	Green
Longbridge Flight Shed	S702	3.1 ha	95 dwellings	0-5	Green	Green	Green	Green	Green	Green	Yellow	Green
Land east of Lickey Road, Longbridge	S586, S703	2.4	142 dwellings	0-5	Green	Green	Green	Green	Green	Green	Green	Green
<b>Further Capacity Identified in BDP / Evidence</b>												
Former MG Rovers works	S739	3.0 ha	260 dwellings	0-5	Green	Green	Green	Green	Green	Green	Green	Green

# Map of Development Sites



## Delivery and Phasing

The AAP will be delivered over a 15+ year programme and therefore will require a flexible approach to implementation, evolving and responding to market conditions as well as the needs of residents and of all the development partners. Since 2011, the area has achieved a significant step change towards delivering the aims of the AAP and will continue to do so over the coming years through approved schemes. Beyond the immediate plans for housing and retail development, infrastructure will be provided to deliver key employment sites at the RIS and ITEC Park.

The implementation of the Longbridge AAP will depend upon a number of complex and at times competing factors and therefore evolve during the development lifespan to reflect:

- commercial interest in the types and mix of land uses proposed;
- the levels of onsite constraints and development costs;
- the viability of schemes at the time planning applications are submitted and;
- Implementation of public sector initiatives and availability of public sector and stakeholder funding.

In order to support the co-ordinated delivery of the scheme considerable work has been done to develop an appropriate implementation and governance structure. This includes:

- The three partner councils have signed a Memorandum of Understanding to support joint working;
- The delivery programme and works will be delivered in partnership with the main developer (St Modwen Properties PLC) and managed through appropriate legal arrangements (s106, s278);
- Project Delivery groups and a new ITEC Board established, Ward Councillor and resident Consultation groups established.

## Sites:

- West Works (RIS & ITEC): The 25 hectare Longbridge employment site is the only AAP area without any current development activity. The site requires significant infrastructure investment and there has been little occupier interest without the infrastructure in place. Providing the necessary highway and fibre infrastructure, while creating an upfront financial cost will significantly improve the marketability of the RIS and ITEC to national and international prospective occupiers.
- East Works: 229 homes under construction in Bromsgrove a further 470 with outline planning approval.

- Town Centre: Phase 1 of town centre complete (13,500 sqm of retail floorspace (predominantly a foodstore), and 3,200 sqm of office floorspace) in 2013, following the development of the Bournville College campus (opened 2011). Scale and design of future proposals requires further discussions with City planning officers before being supported.
- The Flight Shed – the site now has planning permission for 95 dwellings. Potentially other sites in the AAP area may come forward for development.

These types of issues are currently being explored further through the development of a 3 to 5 year delivery plan for the Longbridge AAP.

#### 4.11 Outside the Growth Areas

##### Spatial Strategy and Opportunities

Outside of the Growth Areas there are other development opportunities which contribute to the wider strategy. The spatial focus is on housing development sites and renewal areas, including Kings Norton and Druids Heath, Core Employment Areas and District and Local Centres. This development capacity makes a smaller contribution to overall development in the City when compared to the Growth Areas, although it still has a clear role to support the City's aspirations. The development opportunities in these areas tend to be dispersed, with more sites in the south and east than the north. These sites tend to be smaller in scale and already have a degree of planning certainty.

##### Overall Levels of Growth

Type of Development	Significant Sites		Total
	Sites with Planning Permission / Previously Allocated	Further Capacity Identified in BDP / Evidence	
Housing (dwellings)	2,306	2,939	<b>5,245</b>
Office (sqm)	14,640	0	<b>14,640</b>
Retail (convenience and comparison) (sqm)	59,081	4,000	<b>63,081</b>
Employment Sites (ha)	75.4	31	<b>106.8</b>
Leisure (sqm)	3,010	0	<b>3,010</b>
Other	36,739 (sqm)	8.3 (ha)	<b>36,739 (sqm) / 8.3 (ha)</b>
Opportunity Sites (ha)	0	9	<b>9</b>

**Strategic Infrastructure Requirements (including City Wide Proposals)**

<b>Scheme</b>	<b>Infrastructure</b>	<b>Status</b>	<b>Estimated Total Cost</b>	<b>Delivery Timescale</b>
<b>ENVIRONMENT AND SUSTAINABILITY</b>				
<b>Flood Risk Management</b>	Schemes to Address Flooding*	Funding partly identified	£76.7m	0-10+
<b>Waste</b>	Energy from Waste Infrastructure	Proposal	£50m	0-10+
<b>Biodiversity &amp; Geodiversity</b>	Landscape-scale Biodiversity Enhancements	Funding identified	£2m (to 2015)	0-10+
<b>Smart Energy</b>	Extending the City Centre and citywide Combined Heat and Power Network*	Proposal	TBC	0-10+
<b>Green Infrastructure and Climate Change Adaptation</b>	Allotment Improvement Plan	Proposal	£3m	0-10+
	Parks Infrastructure Growth Schemes	Funding partly identified	£3.5m (to 2013)	0-10+
	Reservoir Work to Park Pools	Funding partly identified	£5m (to 2015)	0-10+
	Canalside improvements (including canal features)	Proposal	TBC	0-10+
	Heritage assets at risk	Proposal	TBC	0-10+
<b>HOMES AND NEIGHBOURHOODS</b>				
<b>Education</b>	Education provision (early years, mainstream and special schools)	Funding partly identified (short term)	See IDP	0-10+
	New education provision (18-25 years of age)	Funding partly identified (short term)	See IDP	0-10+
	Full Participation (18-25 years of age)/ General Training and Employment Initiatives	Proposal	TBC	0-10+
<b>Housing</b>	Kings Norton 3 Estates Regeneration	Proposal	£16m	0-10+
	Druids Heath Regeneration	Proposal	TBC	5-10+
	Bromford Housing Estate	Proposal	TBC	5-10+

<b>Healthcare Facilities</b>	Natural Health Improvement Zone	Funding partly identified	£1m	0-10+
	Food Charter and Food Council	Funding partly identified	£0.5m	0-10+
	People, Place & Purpose Intelligent Health SMART Routes	Funding partly identified	£0.5m	0-10+
<b>Sport and Leisure Facilities</b>	City-wide Sport and Leisure Provision	Proposal	TBC	0-10+
<b>ECONOMY AND NETWORK OF CENTRES</b>				
<b>Employment Land</b>	Support for Core Employment Areas including access improvements, site assembly and branding. Business relocations and mitigating the impacts of HS2	Proposal	TBC	0-10+
	Tyseley Environmental Enterprise District (Economic Zone)	Funding partly identified	£5m	0-10
<b>Network of Centres</b>	Local Centres Programme including environment improvements / traffic management	Proposal	£12m	0-10+
<b>CONNECTIVITY</b>				
<b>Strategic and local Highway Network</b>	Major road corridors developed as key gateways and green corridors*	Proposal	TBC	0-10+
	Yardley Road / Stockfield Road highway improvement scheme	Proposal	£3.5m	5-10
	Highgate Road Improvements (road widening scheme)	Proposal	£13.5m	0-5
	A38M Aston Expressway Tame Valley Viaduct- Phase 3 (maintenance scheme)	Proposal	£82m	5-10+
	Aston Road North/A38 Flyover (maintenance scheme)	Proposal	£10.1m	5-10+
	Chester Road – highway improvements (inc Highways Agency scheme)	Funding identified	£10.6m	0-5
	Journey Time Reliability Improvements to Growth Areas	Proposal	£2.7m	5-10+
	Six Ways, Erdington	Proposal	£5.4m	5-10
<b>Rail Services</b>	Rail improvements to Tamworth / Sutton Park / Camp Hill Leicester Line / Services / Stations (including Moor Street)	Proposal	£210m	0-10+
	Improvements to rail stations and services across Birmingham (Cross City Line, West Coast Main Line, Stratford Marylebone Line)	Proposal	£25m	5-10+

	Water Orton Rail Corridor Enhancement	Proposal	£103m	10+
	New and expanded Park and Ride provision across the City	Proposal	TBC	5-10+
<b>Rapid Transit and Local Bus Network</b>	Birmingham - Kings Heath - Maypole SPRINT	Proposal	TBC	10+
	Birmingham - Hagley Road SPRINT	Funding partly identified	£12.2m	0-5
	Birmingham-A34 SPRINT*	Funding partly identified	£40m	0-5
	Birmingham - Hagley Road Rapid Transit (upgrade from SPRINT to Metro)	Proposal	£250m	10+
	A45 Rapid Transit	Proposal	£50m	5-10+
	Eastside – East Birmingham - Birmingham Airport - HS2 Interchange (Metro/SPRINT)*	Proposal	£470m	10+
	Birmingham – Sheldon - Birmingham Airport – HS2 Interchange (Metro / SPRINT)	Proposal	TBC	5-10
	Smart Network, Smarter Choices Corridor	Proposal	£25m	0-10
	Bartley Green SPRINT	Funding partly identified	£30m	10+
<b>Walking and Cycling</b>	Birmingham Cycle Revolution*	Funding partly identified	£24.3m	0-10+
<b>Digital Connectivity</b>	Open access ducting	TBC	TBC	TBC

Funding identified – project with committed funding or where anticipated funding has been identified for the whole of the project. Funding partly identified – project with committed funding or where anticipated funding has been identified for part of the project. Proposal – project currently without funding.

\* City Wide Projects which have site specific proposals in the Growth Areas.



Site Delivery Assessment

Site Name	Site Ref	Size of Site	Development Type / Scale	Indicative Phasing	Delivery Considerations							Overall Delivery Risk?
					Remediation	Ownership	Demolition	Environmental	Access	Utilities	Other (e.g. funding / support)	
<b>Sites with Planning Permission / Previously Allocated</b>												
Former Smith & Nephew site, Alum Rock Road	E510	3.4 ha	119 dwellings	0-5								
Lyndhurst Estate, Erdington	E211	8 ha	179 dwellings	0-5								
Court Lane Allotments, Erdington	E213	3.7 ha	124 dwellings	0-5								
Nocks Brickworks, Holly Lane, Erdington	E379	6.3 ha	250 dwellings	5-10								
120-126 Alcester Road	S383	0.2 ha	50 dwellings	0-5								
Martineau Centre, Balden Road	S541	4.6 ha	121 dwellings	0-5								
Manor House Northfield	S587	5.2 ha	130 dwellings	0-5								
Browns Green, Handsworth Wood	N309	4.3 ha	155 dwellings	0-5								
Adjacent Bournville College Site, Bristol Road South	S624	1.7 ha	Dementia care facility	0-5								
Land at Booths Lane / Sandy Lane, Great Barr, Birmingham	N733	7.7 ha	249 dwellings	0-5, 5-10								

Adjacent Bournville College Site, Bristol Road South	S724	0.9 ha	128 dwellings	5-10									
Former Hardy Spicer Sports Ground and land between Signal Hayes Road & Weaver Avenue, Walmley	N737	3.2 ha	110 dwellings	0-5									
Franklin House, Bournville Lane	S694	0.6 ha	96 dwellings	0-5									
Spring UR Site, Mere Green	N9d	1.2 ha	Retail led scheme (6,100 sqm)	0-5									
Shaftmoor Lane (Denso etc)	E483	3.5 ha	124 dwellings	5-10									
Shaftmoor Lane (Denso etc)	E566	2.4 ha	278 dwellings and Retail (6,547 sqm)	0-5, 5-10									
Signal Point / Eaton electrics	E54	2.6 ha	Retail (13,350 sqm), employment (6.1 ha) and 72 dwellings	0-5									
Colliers, Sutton Road, Erdington	E9e	2.1 ha	5,100 sqm retail floorspace (including food store)	0-5									
Erdington Central Square, High Street, Erdington	E9f	1.2 ha	5,530 sqm retail floorspace (including food store)	0-5									
Tesco, Stirchley	S9m	4.1 ha	Retail led mixed use – retail 5,140 sqm, office 640 sqm, leisure 110 sqm	0-5									
WCCC Edgbaston	S674	5.2 ha net	Leisure led mixed use redevelopment of existing stadium – including 121 dwellings, 15,615 sqm retail, 14,000 sqm office and hotel	0-5, 5-10									
Meteor Ford site, Moseley	S9h	0.6 ha	Mixed use – 1,634 sqm medical practice / surgery, 1,159 sqm retail	0-5									

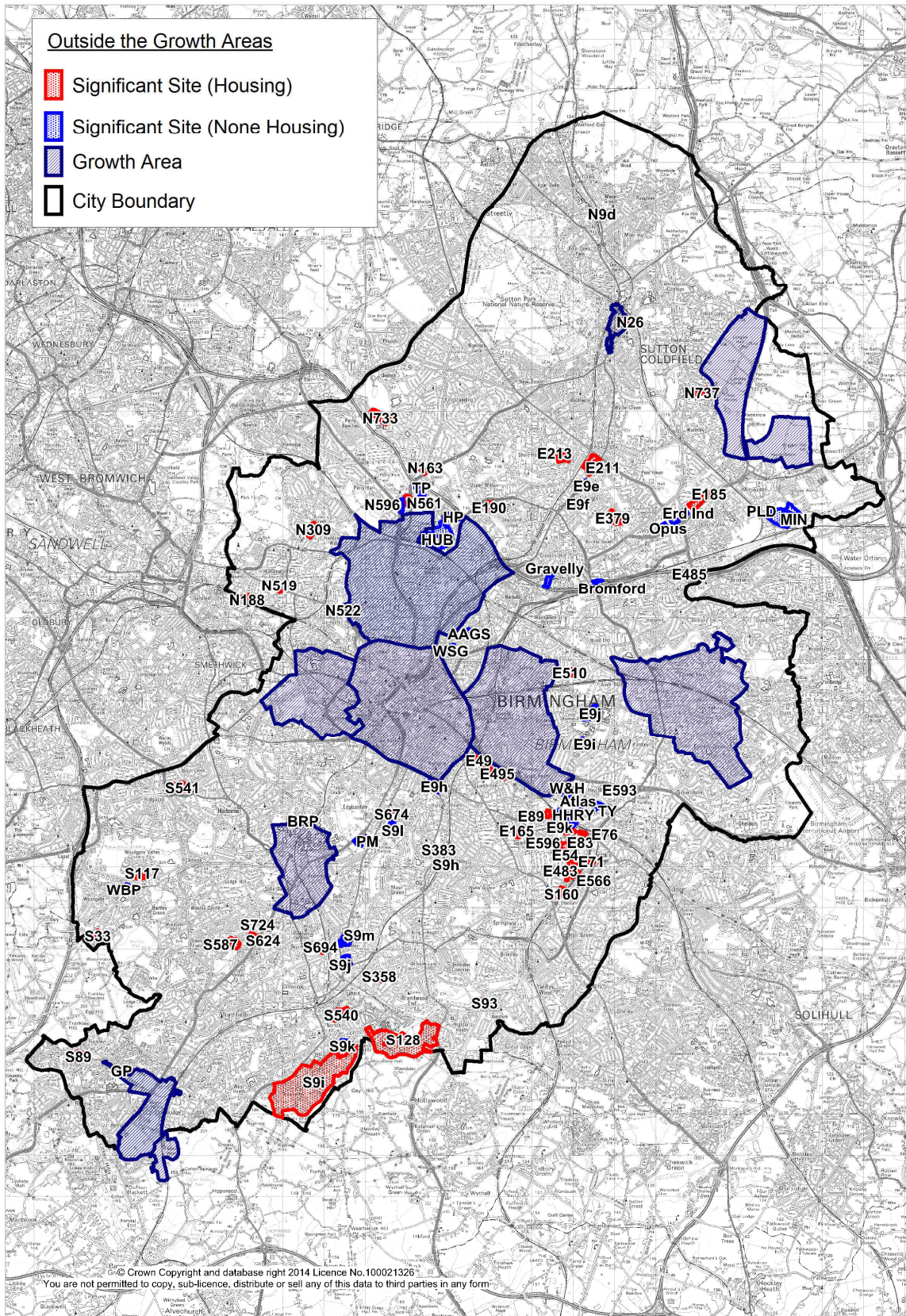
Edgbaston Mill – Final Phase	S9I	0.9 ha	Hotel and leisure complex	0-5									
Food Hub (former IMI Site) and surrounding sites	HUB	36 ha	Employment development	0-10									
Midpoint 2	MIN	16.4 ha	Employment development	0-5									
Tyseley Wharf	TY	4.1 ha	Employment development	0-5									
Webster & Horsfall site	W&H	4.8 ha	Employment development	0-5									
Opus Aspect, Chester Road	Opus	3 ha	Employment development	0-5									
Pebble Mill	PM	5 ha (net)	Employment development (Private healthcare and dental hospital)	5-10									
<b>Further Capacity Identified in BDP / Evidence</b>													
Dolland & Aitchison, Coventry Road	E593	1.3 ha	50 dwellings	5-10									
Cincinatti Building, Kingsbury Road, Tyburn	E185	8.7 ha	430 dwellings	5-10, 10+									
Montgomery Street	E495 & E49	4.7 ha	300 dwellings	10+									
Bus depot, Summer Road / Fox Hollies Road, Acocks Green	E71	1.4 ha	56 dwellings	5-10									
Tyseley Lane/ Warwick Road, Acocks Green	E76	1.3 ha	78 dwellings	5-10									
Rear of 635-773 Warwick Road, Acocks Green	E83	1.8 ha	70 dwellings	0-5, 5-10									
Land off Roma Road, South Yardley	E89	1.9 ha	74 dwellings	5-10									
395 George Road	E190	2 ha	78 dwellings	10+									
Percy Road / Evelyn Road	E165	1.3 ha	50 dwellings	5-10									

Berrandale Road	E485	1.2 ha	60 dwellings	5-10									
Kings Norton 3 Estates Regeneration	S9i	49 ha (gross)	500 dwellings (net) and new local centre (4,000 sqm retail)	0-5, 5-10									
Druids Lane site, Druids Heath	S128	84.5 ha (gross)	254 dwellings	5-10									
Land at Allens Croft	S358	1.1 ha	50 dwellings	0-5									
Land to the rear of 15-87 Cateswell Road, Hall Green	S160	2.7 ha	82 dwellings	5-10									
Wychbury Road Allotments, Bartley Green	S33	1.6 ha	50 dwellings	5-10									
Lakeside Centre, Lifford Lane	S540	4.8 ha	50 dwellings	5-10									
Arden Road, Frankley	S89	0.9 ha	Mixed use - 30 dwellings and 0.5ha employment development	5-10									
Bus Depot, Yardley Wood Road	S93	1.3 ha	64 dwellings	5-10									
55, 61 Stevens Avenue, rear of 2-58 Simcox Gardens	S117	1.9 ha	75 dwellings	5-10									
Royal Works, Sutton Coldfield	N26	1.3 ha	68 dwellings	5-10									
Land adjacent to 57 George Street, Handsworth	N188	1.4 ha	50 dwellings	5-10									
Aldridge Road	N561	2.8 ha	112 dwellings	5-10									
Site off Kingstanding Road	N163	1.1 ha	56 dwellings	10+									
Booth Street / Holyhead Road	N519	0.2 ha	52 dwellings	10+									

Eaton Electricals Ltd, Reddings Lane	E596	5.4 ha	100 dwellings	5-10									
Bill House, Soho Hill	N522	1.2 ha	100 dwellings	5-10									
Former JCC Site, Haden Way	E9h	4.7 ha	Bulky retail consent although scheme to be revised	0-5, 5-10									
Former Waverley School, Hobmoor Road.	E9i	3.6 Ha	Education / community	0-5									
Belchers Lane Playing Fields, Bordesley Green	E9j	4.7 Ha	Studio school and retained and improved playing fields and cricket pitch.	0-5									
Hay Hall Road Yards	HHRy	4 ha	Employment development	0-5									
Former EMR site	E9k	2.1 ha	Employment development	5-10									
Former Atlas Works, Redfern Road	Atlas	2.1 ha	Employment development	5-10									
Site Corner of Bromford Road and Fort Parkway	Bromford	1 ha	Employment development	0-5									
Erdington Industrial Park	Erd Ind	2.8 ha	Employment development	10+									
Arvin Meritor site, Stirchley	S9j	2.1 ha	Employment development	0-5									
Great Park - Hollymoor Point	GP	2.2 ha	Employment development	0-5									
Remainder Plot K, Woodgate Business Park	WBP	0.4 ha	Employment development	0-10+									
Tameside Park, Aldridge Road	TP	1.1 ha	Employment development	0-10+									

Holford Park, Tameside Drive and Holford Way	HP	2.2 ha	Employment development	0-10+									
Park Lane Depot, Park Lane	PLD	0.7 ha	Employment development	0-10+									
Windsor Street Gas Works	WSG	3 ha	Employment development	0-10+									
Land adjacent to Aston Goods Station, Rupert Street	AAGS	1.5 ha	Employment development	0-10+									
Tuckers (75-177 Walsall Road), Perry Barr	N596	4.7 ha	Employment development	0-10+									
Birmingham Research Park, Vincent Drive	BRP	1 ha	Employment development	0-5									
Ardath Road	S9k	4.3 ha	Opportunity site, could accommodate a mix of uses	5-10									

# Map of Development Sites



## Delivery and Phasing

The delivery of development outside the Growth Areas poses less of a strategic challenge given the dispersed nature of development. There will however be site specific issues to address, with limited significant delivery issues identified. Change in these areas will also link into strategic elements of the BPD, particularly to deliver housing growth, housing renewal and employment development, and will benefit from strategic infrastructure to support existing and growing communities. There are a number of schemes / areas which will require support to bring development forward:

- Housing Development and Regeneration

There are a number of areas identified for housing regeneration, including the Lyndhurst Estate (E211), the Bromford Estate (based around a number of small sites), Druids Heath & Maypole (S128), Kings Norton 3 Estates (HR21) which are outside of the Growth Areas. Each of these areas are at various stages of development. There is a Planning Framework in place for Kings Norton, with the first phase of development already underway. Outline planning permission is in place for the Lyndhurst Estate scheme. The delivery of the Bromford Estate renewal is impacted on by floodrisk, although the implementation of the River Tame Strategy will help enable delivery. The Druids Heath & Maypole proposals are a long term project at the early stages of preparation.

There is a strong track record of delivering housing regeneration in the City, including the successful scheme at Park Central to the south of the City Centre. The Birmingham Municipal Housing Trust will have a key role in supporting development come forward, and is already helping to deliver housing renewal in Kings Norton and other areas. Other opportunities for housing regeneration may also come forward during the Plan period. Investment in housing regeneration will improve the quality of place which will support wider residential growth.

- Employment Opportunities

There are large scale employment development opportunities associated with the Economic Zones at the Food Hub adjacent to Perry Barr and at the Tyseley Environmental Enterprise District (TEED). These sites total over 50ha. As they are part of the Economic Zones, there is a bespoke business offer to support the private sector to accelerate development, including simplified planning, access to finance and gap funding. The Food Hub comprises a large site which already has planning permission. The City Council is working in partnership with the site owner PRUPIM to enable delivery, and is the site for the relocated Wholesale Markets from the City Centre. At TEED, there are six identified development



opportunities, some of which have planning permission. The area benefits from an ERDF package to improve and create new enterprise space, and for business development. Strategic infrastructure, including transport improvements, is identified to help bring these sites forward.

Upon the completion of the proposed HS2 rail line, there may be the potential for additional employment opportunities that come forward for development which are not currently available due to the safeguarding direction. Potentially this includes opportunities at Washwood Heath, which has been a long standing opportunity. Any development is only likely to come forward post construction of phase 1 of HS2 which is currently scheduled for completion by 2026.

- District and Local Centres

The BDP identifies potential for growth in several District Centres outside of the Growth Areas, including Northfield, Erdington and Mere Green. The Shopping and Local Centres SPD guides the overall development of the Centres, with other planning documents prepared to give further detail. This includes the emerging Northfield Regeneration Framework which is identifying potential development sites and priorities to support the growth of this Centre. Strategic infrastructure is identified to help improve the overall quality of the environment in the District and Local Centres and this will support the wider delivery of growth and investment in the City.

## 5. Supporting the Delivery of Development

### Development Capacity

Based on the development capacity detailed in Section 4, significant sites make up a large proportion of development potential within the City for housing, employment, retail and offices. The remaining capacity identified in the BDP is made up of smaller sites, windfalls, sites under construction and sites already delivered. The BDP sets out a flexible strategy with clear principles to guide development, and this is reflected in this capacity. For each of the key development types:

- Housing

The overall capacity of significant sites represents approximately half of the housing target within the BDP, with a significant proportion of this with planning permission / in an adopted AAP. Additional residential capacity is also provided in the form of proposed student accommodation identified in the SDP.

Coupled with sites already delivered or under construction, this provides a strong level of certainty at this stage on the deliverability of our housing proposals. The adoption of the BDP will increase this certainty through the release of land in the Green Belt to enable Langley SUE to come forward for development.

- Office

Each of the Centres identified in the BDP for growth has identified capacity to provide for the required levels of office development. Whilst the overall figure indicates that there is some surplus capacity, with a significant amount already with planning permission in the City Centre, this offers flexibility and a choice of sites for the market. It also reflects the fact the City Centre Enterprise Zone programme is phased until 2038, and the Longbridge office figures are contained in the Longbridge AAP and not within the BDP policy.

- Retail

Whilst it is difficult to attribute retail development capacity with the comparison retail target in the BDP (see Appendix A), there appears to be enough capacity in each Centre to achieve the amount of development needed by 2026 (some of which has planning permission and is under construction). For some Centres, including Perry Barr / Birchfield, there are a number of opportunity sites where town centre uses could come forward.

- Employment

Overall there are 273 ha of employment development opportunities, including the Green Belt release at Peddimore. However not all of this is considered to be readily available in line with the definition in Policy TP16 (which includes issues other than the delivery considerations looked at in this report), and there is still a shortage of supply in the Best Quality and Good Quality categories of employment land (the position is exacerbated by the

HS2 safeguarding direction which removes the Washwood Heath site from the employment land supply in the short to medium term, with some land expected to come back onto the market post 2026). The City Council will continue to monitor the situation to ensure that sites are brought forward to meet the needs identified in the evidence base.

### Delivery Overview

The sites detailed in section 4, make up a significant proportion of the development capacity of the City. Based on the site assessment, overall it is considered that the development capacity within these sites is capable of being delivered. A large proportion of sites already have a strong degree of planning certainty. Whilst the assessment is based on best available knowledge, it provides a broad overview of site delivery issues. In addition, there are a number of positive indicators that activity in the development market is picking up, and this renewed confidence is reflected in the number of discussions the City Council is having with developers on scheme delivery.

Sites to be brought forward in the short term (0-5 years) have no site specific issues that would affect / prohibit delivery. In these cases there is already a degree of planning certainty and actions underway to enable site delivery, including the provision of infrastructure. It is a generally similar picture for development which is expected to come forward in the medium to long term (5-10, 10+ years), although some do have identified issues which need to be addressed.

Some sites (approximately 20) were considered to have identified constraints that require further attention to enable delivery. These relate to sites which are longer term propositions (5-10, 10+), providing time to put plans and resources (including infrastructure) in place to address. Overall there are no sites considered incapable of development based on the individual delivery considerations.

Most sites have a clear understanding of the site infrastructure requirements and an agreed way forward to address them. The IDP sets out the strategic infrastructure requirements, particularly in the short term. Infrastructure on the whole is phased to support the delivery of sites. Further details are in the IDP.

The following summarises the delivery issues identified in section 4:

- Remediation

The BDP is largely a brownfield first based development strategy. There is therefore always likely to be a land remediation requirement given the previous uses of sites, and this is reflected in the delivery analysis. Very few sites have known significant remediation constraints which require further attention. In some cases strategic infrastructure is already identified to help enable delivery of these sites.

- Ownership / Land Assembly

Ownership patterns in the City reflect the complex nature of an urban area. The majority of sites were considered low to medium risk reflecting either single ownerships, where owners are working together to bring sites forward or where the City Council is taking action through its compulsory purchase powers. The more significant risks were associated with larger sites in areas where masterplanning is at its early stages, such as the Southern Gateway in the City Centre. However through such work it is possible to lower the delivery risks and give more certainty to investors and businesses.

- Demolition

As a brownfield first based spatial strategy, there is always likely to be a need to demolish structures on site before development can commence. Only one site was identified as having a constraint which requires further attention in this regards, with demolition on the remaining sites not expected to be prohibitive.

- Environmental

This delivery consideration looked at a wide range of environmental issues on sites. In the majority of cases, very few issues were considered a constraint requiring further attention. Flood risk areas are highlighted as one of the main issues affecting a number of sites. These sites have been / will be subject to Flood Risk Assessments to ensure that sites are suitable for development, including the requirement for mitigation measures to be put in place. Strategic infrastructure has also been identified to provide flood risk mitigation strategies to support development. In other cases, for example sites affecting historic or environmental assets, the management and mitigation of any impacts can be managed through the development management process.

- Access

No significant site access issues were identified in the site delivery assessment, although there are a number of sites which will require improvements and alterations to access. The requirements for strategic transport infrastructure will enable the delivery of growth in the wider area.

- Utilities

No significant utility issues were identified that would impede the delivery of sites as extensive networks are already in place. The only broad area where the capacity of utilities was raised as a moderate delivery consideration is the City Centre, where there are some wider capacity issues. However this has been identified as a strategic infrastructure requirement.

- Other (including viability)

A number of delivery considerations were identified in this category as potentially impacting on site delivery, including links to other development sites and funding gaps. In the majority of cases these were not considered significant, or actions were being taken to enable delivery. The main site specific issue raised in this category was around a known lack of development finance to enable the identified development to commence on site, and this also links into wider issues in the development market.

The difficult economic conditions of the past few years have impacted on delivery, particularly in terms of access to finance for property development. This is influenced by a number of factors, including lenders aversion to risks. For commercial schemes, this also includes the need for a certain level of guaranteed occupation which is impacting on the ability for developers to bring forward speculative schemes and ensure a readily available supply of accommodation.

The City Council continues to work with its partners to address barriers within our control to reduce risk and support new development (see Actions to Support Site Delivery below). The evidence base for the BDP (see Section 3) indicates that development sites in the City are generally viable, subject to being able to secure adequate levels of finance. In 2014, the City is continuing to see an increase in the amount of development coming forward as more confidence returns to the market. This has freed up some credit within financial institutions for development, although it will be important to monitor the ongoing situation.

#### Actions to Support Site Delivery

The Implementation Section of the BDP sets out the mechanisms that will be used to ensure the overall successful delivery of the Plan. There are a number of actions that the City Council and its partners will, and are already, undertaking to ensure the delivery of development. These actions will help address issues identified in the site assessments and reduce overall risks to enable development and secure investment. The actions include:

- Planning Certainty and Section 106 Contributions

The City Council has put in place a streamlined system to support developers through the planning stage of development, particularly for the Enterprise and Economic Zones, and advice and support is available to developers to amend planning permission in the current challenging economic climate. For the majority of sites, planning is not a delivery constraint as planning permissions are in place, or sites have at least some planning certainty.

For some of the longer term sites, detailed planning applications have not yet been received as they expected to come forward in the later years of the Plan period. The City Council will work with developers on up-front masterplanning to inform planning applications. The streamlined system will ensure that developers have the support they need to bring these proposals forward.

The City Council operates a flexible approach to section 106 contributions to enable the implementation of development. Each planning application is assessed on its own merits, and if a development cannot afford the total desirable levels of contribution, the requirement is reduced, and overage clauses utilised to capture future uplift in schemes where they become more viable. This method is relevant to all types of development, particularly so for housing where the costs of providing affordable housing can have a big impact on the viability of a proposal. This flexible approach has a positive impact on the viability of development, particularly in the current economic climate, whilst still ensuring the collection of essential contributions. Existing section 106 agreements have also been renegotiated, where they have rendered developments unviable, to enable the development to proceed.

This approach is reflected in the BDP where viability considerations form part of individual policies. This provides a flexible framework which can then take account of changing market conditions and priorities.

- Planning Tools

To support the delivery of the BDP, there are a number of planning tools available to the City Council to support growth. These can help to give certainty to the market, prioritise investment, and also coordinate the activities of partners to ensure infrastructure is in place to support development.

In addition to the BDP, there are a number of statutory plans which have already been adopted by the City Council, including the Longbridge and Aston, Newtown & Lozells Area Action Plans. These Plans identify development sites to facilitate growth in these areas. The emerging Bordesley Park AAP and Balsall Heath Neighbourhood Plan will also identify development sites. The use of Local Development Orders (LDO) will also be considered where they can support economic growth, such as the adopted LDOs for Digbeth and Birmingham Science Park.

The City Council will keep the need for additional statutory plans under review to ensure that growth and infrastructure provision can be planned for and progressed. The use of other planning tools, such as Local Development Orders, Supplementary Planning Documents and informal planning documents (such as regeneration frameworks and development briefs) will also be used to support the delivery of sites.

- Land Assets and Land Assembly

The City Council has extensive landholdings within Birmingham and will seek to use these to take forward the strategy of the BDP, including development promotion. The use of this asset forms part of the resources that the City Council can contribute to joint ventures and development agreements to help bring forward comprehensive development.

Compulsory purchase powers are an important tool for the City Council and other public bodies to assemble land to help deliver social and economic change. The City Council has a strong track record in utilising these powers to support urban regeneration schemes and the

delivery of infrastructure. These powers have been used successfully to help bring forward the office led mixed use scheme at Paradise Circus in the City Centre, and are being used to support the development of the Aston RIS.

In the first instance the City Council will try to negotiate and work with landowners to bring forward development; however these compulsory purchase powers will be used where the acquisition of land is necessary to enable comprehensive schemes that deliver economic, social and / or environmental benefits.

- Infrastructure Provision

The IDP identifies the key infrastructure necessary to support the growth aspirations of the BDP. The City Council has a pivotal role as an infrastructure and service provider and will help coordinate the delivery of infrastructure to support new development. The recent announcement of the LEP Growth Deals and the updated Enterprise Zone Investment Plan will further support the delivery of infrastructure and development.

- Birmingham Housing Growth Plan / Birmingham Municipal Housing Trust

The City Council is developing a Housing Growth Plan which sets out the ambitions to achieve housing growth over the next 5 years. It will set out the actions, partnerships and resources that will be used to help contribute toward the provision of the amount and type of new homes that the growing population of the City needs. A number of priority actions will be identified to be delivered over the coming years, including approaches to working with housing developers and Housing Associations to bring forward residential development.

A key part of the Housing Growth Plan is the Birmingham Municipal Housing Trust (BMHT) which is allowing the City Council to support housing growth by acting as a provider of new homes. The BMHT was set up by the City Council in 2009 to build new council homes following changes made to the Housing Revenue Account subsidy system by Government which made it financially viable for local authorities to build new council homes for the first time in 30 years. The award winning programme has provided high quality homes across Birmingham with over 2,000 homes under construction or already delivered. The development programme for BMHT estimates that 3,500-4,000 new homes could be delivered over a ten year period 2012-22, subject to the availability of sites.

- Partnership Working

The successful implementation of the BDP will require a wide range of organisations, including the private sector, to work together to bring forward development sites. The City Council will have an important role in coordinating and facilitating actions and activities to support development, particularly on major redevelopment projects. The Homes & Communities Agency also has an important role given their local portfolio of a number of sites in the Growth Areas, including the Regional Investment Site in Aston, the proposed Sustainable Neighbourhood at Greater Icknield, Longbridge, and Eastside in the City Centre.

There is a strong track record of partnership working in the City, including the use of joint ventures and development agreements to bring sites forward with the private sector. These approaches are already being used to bring development forward on Eastside Locks and Paradise Circus in the City Centre, and at Icknield Port Loop in Greater Icknield.

- City Centre Enterprise Zone

The Greater Birmingham and Solihull Local Enterprise Partnership (LEP) chose Birmingham City Centre as the location for its first Enterprise Zone (EZ) in 2011. The EZ comprises 26 development sites across the City Centre with opportunities for 1.3 million sqm of new floorspace. The delivery of the EZ is a priority for the City Council and the LEP to drive forward economic growth and job creation. The LEP and the City Council have an approved an updated Investment Plan for the EZ to enable development and support growth, which is funded by borrowing against future business rates income.

The Investment Plan sets out the initial programme of projects worth £278 million up to 2022/23. Investment is being targeted on a theme basis to ensure the development of EZ sites, but also supporting initiatives around marketing and business support. Funds are identified for a range of projects that will help unlock sites for development and enable the delivery of the growth, jobs and uplift in business rates. The projects identified for investment focus on those sites with the greatest potential to deliver development and so act as a catalyst to the future success of the EZ. This includes £87.8 million for the Paradise Circus scheme, £15 million for the Site Access & Development Fund, £25 million for the Metro extension to Centenary Square, and £50 million to support the HS2 Growth Strategy.

- Economic Zones

In 2012, Birmingham identified six Economic Zones (including the City Centre Enterprise Zone) to ensure the City maximises its opportunities to deliver economic growth. Sectors have been targeted with economic growth potential, and the Economic Zones have been matched to suit their locational requirements. The Economic Zones have a number of economic development opportunities which are identified in the BDP, and the business offer, including simplified planning and business development programmes, will help to support the private sector to accelerate and bring development forward.

- Funding

Whilst the overall picture for the BDP is that development sites can be delivered, the viability of development sites will be impacted on by the prevailing market conditions, as well as any site specific delivery considerations. Both public and private sectors need to work in partnership to make the best use of available resources, potentially by combining funding sources, and to prioritise infrastructure to support the sustainable growth of the area.

It is recognised that the economic climate has placed funding constraints on developers and the public sector in bringing development forward, although market conditions are improving. The wider economic climate is highly likely to change during the Plan period and



this will impact on the availability of funding. In improved market conditions, it is likely that it will be easier to bring sites forward. Even in poor market conditions, developers and the City Council, working with its partners, have still been able to deliver new development. There will be a role for public sector funding support to help support the delivery of sites, particularly in those areas where development is less viable.

In the future, LEP's will have a greater control over certain public funding to help stimulate economic growth. From 2015, LEP's will be able to access £2 billion a year of central Government funding from the Single Local Growth Fund. This fund will comprise existing funding streams, including, local authority transport funding, into a single fund. In July 2014, the Government announced a £357.4 million Local Growth Fund deal for the Greater Birmingham & Solihull LEP.

The IDP sets out potential funding sources to aid the delivery of infrastructure to support development. The table below indicates potential funding opportunities which can be used to support property development that are currently available.

Table 1 – Public Sector Funding

<b>Fund</b>	<b>Summary</b>
Growing Places Fund	A Government fund (loan / grant) totalling £500m to address infrastructure constraints, promote economic growth and deliver jobs and houses. The fund is managed locally by the LEP and is recyclable so that monies are repayable and can be used to support future projects. The LEP has been allocated £15m, which has already been used to help provide infrastructure to support development schemes at Greater Icknield and the Aston RIS.
Regional Growth Fund (RGF)	A Government fund (loan / grant) totalling £3.2 billion, to support projects and programmes that are using private sector investment to create economic growth. There have been four bidding rounds so far, with a fifth round in autumn 2013 and sixth in 2014 following the allocation of a further £600 million to the fund. Birmingham has already benefitted from RGF to help deliver a number of projects.
Tax Increment Financing (TIF)	The Government has proposed that it will allow Local Authorities borrowing powers, known as TIF, to borrow against predicted growth in their locally raised business rates. They can use the borrowing to fund key infrastructure and other capital projects, which will support locally driven economic development and growth. In Birmingham, TIF was part of the City Deal package agreed with Government. The funding approach to support the City Centre Enterprise Zone has adopted a TIF like approach to fund the EZ Investment Plan to 2017/8. The long term income from the EZ (until 2038) can be used by the LEP to deliver projects to support its priorities.
Enterprise Zone – Site Access & Development Fund	To facilitate the delivery of key sites within the EZ, £148.3m of funding has been identified for site access and development in the EZ Investment Plan to 2022/23 (as part of a wider £275m package to support the delivery of the EZ). The focus of this fund is investment in the Paradise Circus (£87.8m) development, with funding also identified to bring forward the Southern Gateway and £15m support for other EZ sites.

Enterprise Zone - Local Infrastructure Fund	This is a Homes & Communities Agency fund to boost Enterprise Zone schemes and accelerate locally supported large scale housing development. Loans/grants were made available for works including land remediation, upgrading utilities, links to the road network and reconfiguration of site layouts.
European Regional Development Fund (ERDF)	ERDF is focused on reducing economic disparities within and between EU member states by supporting economic regeneration and safeguarding jobs. The current programme is managed by DCLG, and ends in 2013. The future programme will cover the period 2014 to 2020 and the LEP area has been allocated €255.8m (including European Social Fund allocation). The fund has already been used in Birmingham to help delivery property investment to support businesses, including funding in for the Digbeth, Jewellery Quarter, Tyseley and East and North Birmingham areas.
Finance Birmingham	This is a City Council established local fund to support Small to Medium size Enterprises (SMEs). It offers loans of £100k to £1m, and can be used on property development schemes.

- Business Relocation

The regeneration of areas can lead to a need for occupiers to be relocated to carry on their business / activity. This includes the need to relocate the Wholesale Markets to enable the delivery of the Southern Gateway in the City Centre. The Business Enterprise and Innovation section of the Council offers support to businesses to invest in the City. In addition, Business Birmingham, part of a wider public / private partnership which promotes Birmingham, has an aim to create jobs by supporting companies looking to locate or expand in the area. Both of these services will help enable successful business relocation in the City.

- Promotion

An important part of being able to secure the successful growth of area will be the promotion of the offer that Birmingham has to investors, businesses and developers. To deliver this, Marketing Birmingham as part of a public/private partnership supported by the City Council, promotes Birmingham to the wider world to secure inward investment and strengthen the image and profile of the area. Significant work has been done to support the EZ, and the wider LEP area is already one of the most successful in the UK at attracting foreign investment according to figures for 2013/14.

- Monitoring Delivery

The performance of policies contained in the BDP will be evaluated annually in the Authorities Monitoring Report in line with the monitoring framework. A key part of this will be to track the overall delivery of the strategy, which should enable the City Council to identify how site delivery is progressing and identify appropriate actions to ensure the overall strategy is delivered.

This SDP was based on the best available knowledge at the time of writing and future updates to this SDP will review and update information to maintain an up to date position on delivery issues.

## 6. Conclusion

This study has demonstrated that the larger scale development sites that form a key part of the evidence base for the BDP are capable of being delivered and that the overall strategy is therefore achievable. Overall the study presents a clear understanding of delivery issues in the City based on best available knowledge.

The key conclusions from this study are that:

- The evidence base for the BDP indicates that development is considered viable overall in the City, although there are area / site specific considerations which will be influenced by market conditions
- The significant sites represent a large proportion of overall capacity within the City. There is already a large degree of planning certainty, including planning permissions, in place to enable delivery in the short to medium term.
- All sites are considered to have a reasonable prospect of delivery with actions to address issues / constraints. Those sites with constraints are phased later in the plan period allowing time and resources to be identified to bring these sites forward.
- There are a number of actions that can, and are already, being undertaken to help bring development sites forward to address these issues and constraints.

The contents of the study will be reviewed going forward to maintain an up to date position on delivery issues.

## **Appendix A – Technical Note on Inclusion of Sites and Figures**

The site assessment undertaken in section 4 was based on sites identified in the SHLAA, Employment Land Review and other known development opportunities. Updates were undertaken to details about sites where they were different to the evidence base (these details will feed into future updates to the evidence). Additional sites have been assessed where they are known to form an important part of future capacity even where they were not in the existing evidence base - this includes planning permissions granted for significant sites since the evidence base was completed. In some cases sites have been grouped together e.g. where they are adjacent to each other and share similar delivery considerations.

Information on capacity was related back to the relevant baseline year for each type of development.

Retail figures have not been split by convenience or comparison retail, or by the various types of A Class use, as the information was not available in an easily accessible format. Some permissions also have a degree of flexibility in terms of the type of development they could potentially build out.

In terms of the use of gross and net figures, the capacity of sites relate back to the figures contained in the evidence base. This generally means that housing figures are net, whereas the figures for other types of development are gross. This enables the capacity of development to be related back to the figures in the BDP, although they will not total the same as this study only assesses the capacity of significant sites.

It is important to note that the capacity of each site is based on existing knowledge. The main assessment was carried out in Spring / Summer 2013 with the support of the various teams in the Regeneration and Planning section of the City Council. The report has since been updated to reflect the 2014 SHLAA. It is subject to change as detailed proposals come forward. The evidence makes assumptions on the capacity of sites where they do not have firm proposals / planning permission. However the analysis still indicates what sites are likely to be available for development.