



Your ref:
Our ref: CV/RW/BT/789

15 April 2011

Development Strategy Manager
South Lakeland District Council
South Lakeland House
Lowther Street
Kendal
LA9 4DL

Dear Sir/Madam

LAND ALLOCATIONS DPD CONSULTATION: LAND AT WEST LODGE, ULVERSTON, REPRESENTATIONS ON BEHALF OF RAWDON PROPERTY

These representations are submitted on behalf of Rawdon Property (RP) in response to the Councils emerging Land Allocations Development Plan Document. RP are promoting a 3ha Greenfield site located at West Lodge, Lightburn Road, Ulverston which is identified in the emerging DPD for employment purposes (site reference M11M). It should be noted that these representations relate solely to the land within the control of Rawdon Property as indicated in the red edge plan attached.

The West Lodge site (hereafter referred to as 'the site') falls outside of the development boundary for Ulverston and is located within the Green Gap allocation as identified in the composite Proposals Map. The site is however strongly influenced by surrounding urban development. Following a careful re-appraisal of the role of the land by the Council it has been rightly concluded not to represent a critical element of the Green Gap allocation in this area. As a consequence, the site has been identified in the emerging DPD as a potential allocation for a business/science park.

We concur that the land does not need to be protected as Green Gap and represents a clear development opportunity within the life of the LDF.

Context of the Representations

RP are promoting the mixed use redevelopment of the site for a net retail foodstore of approximately 2,500 sqm as well as modern, high quality employment floorspace. As further explained below it is considered that the site represents a highly sustainable, accessible and suitable location for this form of development and, we believe, represents the only fully deliverable and achievable site for substantial scale retail in the area close to Ulverston town centre.

Site Characteristics

The site is bounded by the Furness Railway line to the south and the A590 Lightburn Road to the north. To the immediate east and west are open fields. The site is located in close proximity to a number of urban land uses including a garden centre to the north, residential properties to the north west and the Daltongate Business Centre to the north

east. The character of the area is clearly therefore one of urban fringe, and it is well related to the town, rather than the open countryside beyond.

As part of the Council's detailed evidence base prepared to support the Allocations DPD a 'Green Gap Assessment' has been undertaken for the Swarthmoor/Ulverston area. The purpose of the review is to reconsider the current Green Gap allocation and to establish whether the designation is still justified in its entirety. The review identifies that the land at West Lodge is no longer deemed necessary to form part of the Green Gap for a number of reasons including the fact that:

- There is already a degree of coalescence between Swarthmoor and Ulverston due to historic ribbon development along the A590;
- Such is the topography of the site and surrounding area the built edge of Swarthmoor is not visible from the edge of Ulverston therefore the most northern part of the green gap along the A590 is the most contained, has limited identity and recreational and biodiversity opportunities;
- Land north of the railway line is contained in terms of openness, aspect and views has a greater concentration of built development contributing towards the urban fringe character;

As a consequence the removal of Green Gap and the protection it affords is not deemed to be an issue as there would still be adequate protection in those areas where the two settlements are at the greatest risk of coalescence. We strongly support the Council's findings and agree that it is necessary for this land to be removed from the Green Gap and consider the site to be entirely suitable for development.

Proposed Business/Science Park Allocation and Suitability for Development

The identification of the land at West Lodge for a business/science park under draft policy U6 is welcomed and the development requirements set out at page 90 of the allocations DPD are noted. The identification of the site as an allocation is a clear acknowledgement of the suitability of the site for development. This is reaffirmed in the recently published Core Strategy Inspectors Report which noted that the location was 'well grounded' and 'likely to help deliver necessary regeneration' in the area.

Delivery of the Site and Requirement for Cross Funding

Whilst the identification of the site for development is welcomed we have significant concerns regarding the implications of the current economic downturn and likely future market conditions for the unlocking and delivery of the site solely for employment development.

Rawdon Property has received specialist market advice from local property agents which indicates that:

- There is currently limited market demand for employment land in the Ulverston area with the majority of demand for small scale second hand premises;
- Whilst it is likely that demand will increase at some future point and these needs could be met on the West Lodge site, it is very unlikely that the significant public sector leverage required to unlock and service the site will be forthcoming; and
- Private sector investment to secure the employment development alone is highly unlikely over the short to medium term.

Whilst the site is therefore an appropriate location for new development it is evident on the basis of this evidence that a substantial period of time and a reversal in economic conditions will be required for the site to be developed through market demand alone, without substantial public sector subsidy which is unlikely to materialise. On this basis whilst the site could be developed for traditional employment uses it is not likely to be fully developed for very many years.

An alternative and preferable land use option which will generate far greater numbers of jobs and substantial economic activity in the short to medium term is for the site to be released for a mix of uses comprising a retail foodstore and employment development. This mix of uses would provide the private sector investment necessary to deliver development including direct jobs resulting from the retail store and new employment premises. A number of other significant benefits would be delivered in the short term including wider regeneration benefits, jobs and training, skills enhancement and helping to reduce out-commuting from the area.

The Case for Retail Development

We believe there are very strong grounds for further convenience goods retailing in Ulverston, on its own merits, based on the findings of the latest Retail Assessment for the area and other available evidence. The evidence base identifies significant levels of convenience goods expenditure leakage from the Ulverston area (mainly towards Barrow) and a significant market share deficit as a result.

A detailed review of the retail information leads us to conclude that it would not be inappropriate to suggest that a foodstore of approximately 2,500 sqm (net) is required in order to meet the capacity which has been identified. In this respect the West Lodge site is exceptionally well located to perform this role and meet the other key tests set out in PPS4 owing to its location in comparison to the existing Booths Store.

Furthermore the site is genuinely accessible given its excellent accessibility credentials and the close proximity to the town centre provides a realistic opportunity to secure linked trips which will assist in securing the ongoing vitality and viability of Ulverston. HOW Planning have prepared a detailed retail assessment which can be provided to the Council for further discussion as required.

Capacity of the Town Centre to Absorb a New Foodstore

PPS4 seeks to protect and enhance town centres and as a result the sequential test requires consideration of the town centre to accommodate new retail proposals in the first instance. From our review of the centre, due to its layout and form it is not considered that there are any suitable, available and deliverable sites either within or on the edge of Ulverston which could accommodate a major foodstore development.

It is recognised however that the Robinson's Brewery site may become available in the near future as it has become surplus to the company's requirements. There are a number of reasons why this site is unlikely to prove to be suitable or deliverable for a foodstore development including:

- The site is dominated by a range of character buildings associated with the historical use of the site as a brewery which do not lend themselves towards practical conversion or reuse for significant retail development;

- The buildings are located within the Town Centre Conservation Area and are therefore afforded the full weight of Core Strategy heritage policy which seeks to safeguard and enhance the historic environment and its setting;
- It is likely to prove very difficult for a foodstore building and the associated requirement for car parking, access and servicing areas to be facilitated on the site and there is very limited prospect of securing adjacent land without incurring unacceptable highways impacts;
- The site and buildings represent a heritage asset as defined in PPS5, the historic and architectural significance of which is likely to be entirely lost if redeveloped; and
- Proposals for the demolition of the buildings is likely to trigger the requirement an Environmental Impact Assessment following the recent Court of Appeal decision of *Save Britain's Heritage v Secretary of State* [2011] EWCA Civ 334.

It can be concluded that there are very strong grounds to conclude that the brewery site does not represent a deliverable site and cannot therefore be said to be a sequentially preferable location due to its historical importance and the inability to reconcile the objectives of heritage policy and the physical requirements for a foodstore development.

Possible Alternative Sites

Ulverston Canal Head

Notwithstanding the comments which we make below, it is considered that, in principle, the Ulverston Canal Head does not represent a sequentially preferable site. It is in fact no better related to Ulverston Town Centre than the West Lodge site and is located (at its nearest point) slightly further away from the Primary Shopping Area. As stated previously, the Council have concluded that the West Lodge site is an appropriate location for new development (as borne out through its proposed allocation) therefore the fact that Canal Head site is already located within the Development Boundary does not elevate the site above West Lodge in sequential terms.

The Canal Head site is identified in the adopted Core Strategy as a Regeneration Opportunity Area. Policy CS3.2 of the Core Strategy identifies that the Council's objectives are to promote the mixed use regeneration of the Canal Head to compliment existing activities in the town centre including a range of employment, tourism, residential and other associated recreational related development. The site is also identified as a Mixed Use Site in the Allocations DPD for a mix of residential, heritage, leisure and tourism uses in line with the Canal Head masterplan (which was published in 2005).

Whilst there may be potential to physically accommodate a foodstore on this site it is considered that there are a number of significant barriers to achieving the delivery of new development here including:

- The Council's ambitions for the Canal Head are for a high standard of design and public realm where openness is an important consideration. Due to the bulk and form of most foodstore developments it is unlikely that this requirement could easily be achieved;
- Development is required to be sympathetic towards the setting for the Grade 2 listed terraced housing adjacent the site which would be impacted upon by the bulk and form of a foodstore;

- The Canal Head and Corridor masterplan and supporting evidence for the Site Allocations DPD note that extensive land assembly is required to deliver development. Page 104 of the Ulverston 'Factfile' document states that there are complex land assembly issues and that the Auction Mart plc premises has been confirmed as 'not available'. Our investigations confirm that this remains the position.
- The Council's evidence base identifies the potential for cumulative negative adverse highways impact on the A590 which the development would necessarily have to connect to;
- The Highways Agency's previous position as identified in the masterplan was that the existing A590 Canal Street/North Lonsdale Terrace junction could prove to be a major constraint to any development aspirations;
- As a consequence the HA have previously requested that access be sought to the site through the existing Booths Supermarket however the ability to deliver such a link is not straight forward;
- There are identified flood risk, drainage capacity and other technical considerations which it is noted will substantially add to the cost of delivering the regeneration of this land; and
- The site is an area of medium to high risk of flooding and we note that certain drainage and other infrastructure requirements are necessary before development can take place.

As a result of these considerable constraints it can be concluded that there are very serious doubts regarding both the viability and deliverability of the Canal Head site in the short to medium term. It is evident from the masterplan document that significant public sector funding was anticipated to be necessary to deliver development, for which there are now limited prospects of securing.

It is notable that there are also considerable uncertainties regarding the potential to establish a safe and suitable access point to the site. Highways considerations have historically been a major concern in this part of Ulverston and it is clear that there are various impediments to achieving a satisfactory solution. Despite the Canal Head Masterplan having been published some 6 years ago, no development has been forthcoming on the site which is representative of the difficulties encountered.

We therefore do not consider the Canal Head to represent a sequentially preferable site to West Lodge as it is no better related (or located) in terms of its proximity to the town centre in retail terms and is clearly not available or deliverable in the near future.

Summary and Conclusions

The Councils proposal for a development allocation on the West Lodge site is welcomed and fully supported by Rawdon Property. Notwithstanding the suitability of the site for development, the ability to achieve the delivery of employment development without the benefit of substantial public sector investment is considered to be highly unlikely. In addition to meeting future employment needs the Council are also faced with a pressing need to plan and make appropriate provision for a substantial new foodstore in Ulverston for which no opportunities have been identified through either the Core Strategy or Draft Allocations DPD.

The major benefit of developing the land at West Lodge is that the site can be brought forward for a comprehensive mixed use development in the short term thereby delivering a substantial level of employment (approximately 200 jobs alone through the retail

development) in addition to bringing forward 'traditional' employment uses (B1/B2/B8). This is possible due to the absence of site constraints and ability to attract and deliver the private sector funding necessary to access and fully service the site.

For the reasons outlined previously it is considered that the site fully complies with the sequential test when compared against the reasonable alternatives in Ulverston and offers the genuine opportunity to perform a complimentary role to the town centre.

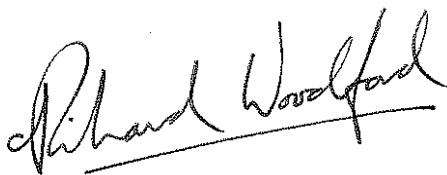
Whilst the development of a foodstore would utilise part of a site which is currently allocated for employment development it is considered that the benefits which would be derived from more immediate regeneration, economic stimulus and the ability to meet wider socio-economic objectives more than outweighs any conflict with the Council's emerging Site Allocations DPD.

Whilst it is clearly appropriate for the Council to adequately plan for the employment needs of the Borough (over the Core Strategy period) it is considered that the mixed use redevelopment of the site presents the only realistic opportunity to secure the private sector investment necessary to unlock the site and the significant benefits associated with its development. The opportunity is also presented for the Council to appropriately plan for the retail needs of Ulverston which have currently gone unmet contrary to all of the supporting evidence and the guidance set out in PPS4.

The West Lodge site is considered to be entirely suitable for a mix of retail and employment development given its location, accessibility, ability to accept the development in landscape and amenity terms and in all other technical aspects. Crucially, this mix of development is capable of being delivered on the site. We therefore recommend that the Council identifies the site for mixed use development comprising retail and employment development in the next iteration of the Allocations DPD.

Rawdon Property are committed to delivering the development of the site and welcome the opportunity for an early meeting with the Local Planning Authority to discuss the issues raised in these representations. I should be grateful if you could confirm receipt of this letter for our records and ensure that we are identified on the Council's consultation list for all relevant future consultation exercises.

Yours faithfully

A handwritten signature in black ink, reading 'Richard Woodford', with a horizontal line underneath the name.

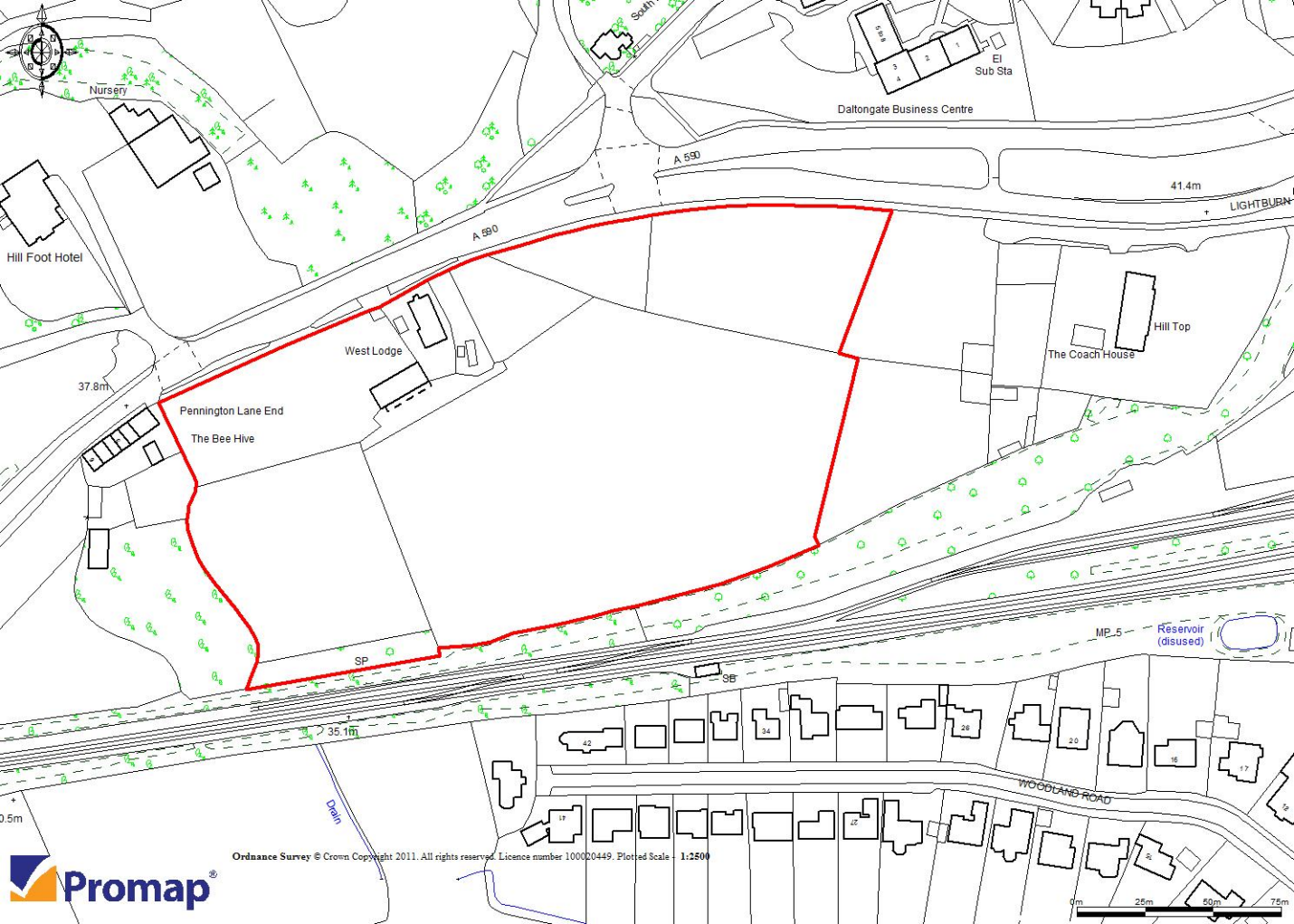
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Enc: Site plan edge red

CC: B Scott – Rawdon Property
T Taylforth



Land at West Lodge, Lightburn Road, Ulverston

Representations to the South Lakeland
District Council Land Allocations DPD
(Proposed Submission Version)

April 2012

On behalf of Rawdon Property and
Sainsbury's Supermarkets Limited



Rawdon Property



HOW



Sainsbury's



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Aerial site context plan

1. Introduction & Site Context

Overview

1.1 These Representations are submitted on behalf of Rawdon Property (RP) and Sainsbury's Supermarkets Limited (SSL) in relation to land located at West Lodge, Lightburn Road, Ulverston (the site). The site comprises a total of 4.6ha, 3.1ha of which is identified in the Publication Version Land Allocations DPD (the DPD) as a B1 employment allocation for a Business/Science Park. RP are promoting the site for a mixed use development comprising retail development and high quality employment floor space.

1.2 RP have been promoting the site for a number of years and previously submitted representations to the Councils Land Allocations Emerging Options Consultation Development Plan Document in April 2011 (a copy of these representations are attached for reference). The Emerging Options DPD identified approximately 4ha of the site as an employment allocation (reference M11M). The representations submitted sought an amendment to the DPD in order that it should identify the site as a mixed use retail/employment site.

1.3 The February 2012 Publication Version of the DPD carries forward the allocation of land at West Lodge as a proposed employment site but the extent of land comprising the allocation has been reduced by approximately 1 hectare as the Council have removed the westernmost parcel of land. The Council's 'Land Allocations DPD - Consultation Statement' document confirms that the Council have opted to reduce the extent of the proposed employment allocation primarily in response to an objection received in relation to the landscape impacts of development. Furthermore the Council's Conservation Area Officer has also stated that not developing the western most parcel of land, or using it for tree planting is required to better protect the setting of a listed building in the vicinity.

1.4 These Representations consider the site in further detail, relevant planning policy objectives in addition to the soundness of the proposed approach to the land allocations DPD. Information is provided to demonstrate that delivery of the site solely for employment purposes is not viable and that a higher value use is required to bring forward positive economic development in the form of a mixed use development. It is also shown that this approach would comply with the tests of soundness and that allocating the entire site for mixed use will maximise the planning benefits of development and would also be technically achievable and deliverable.

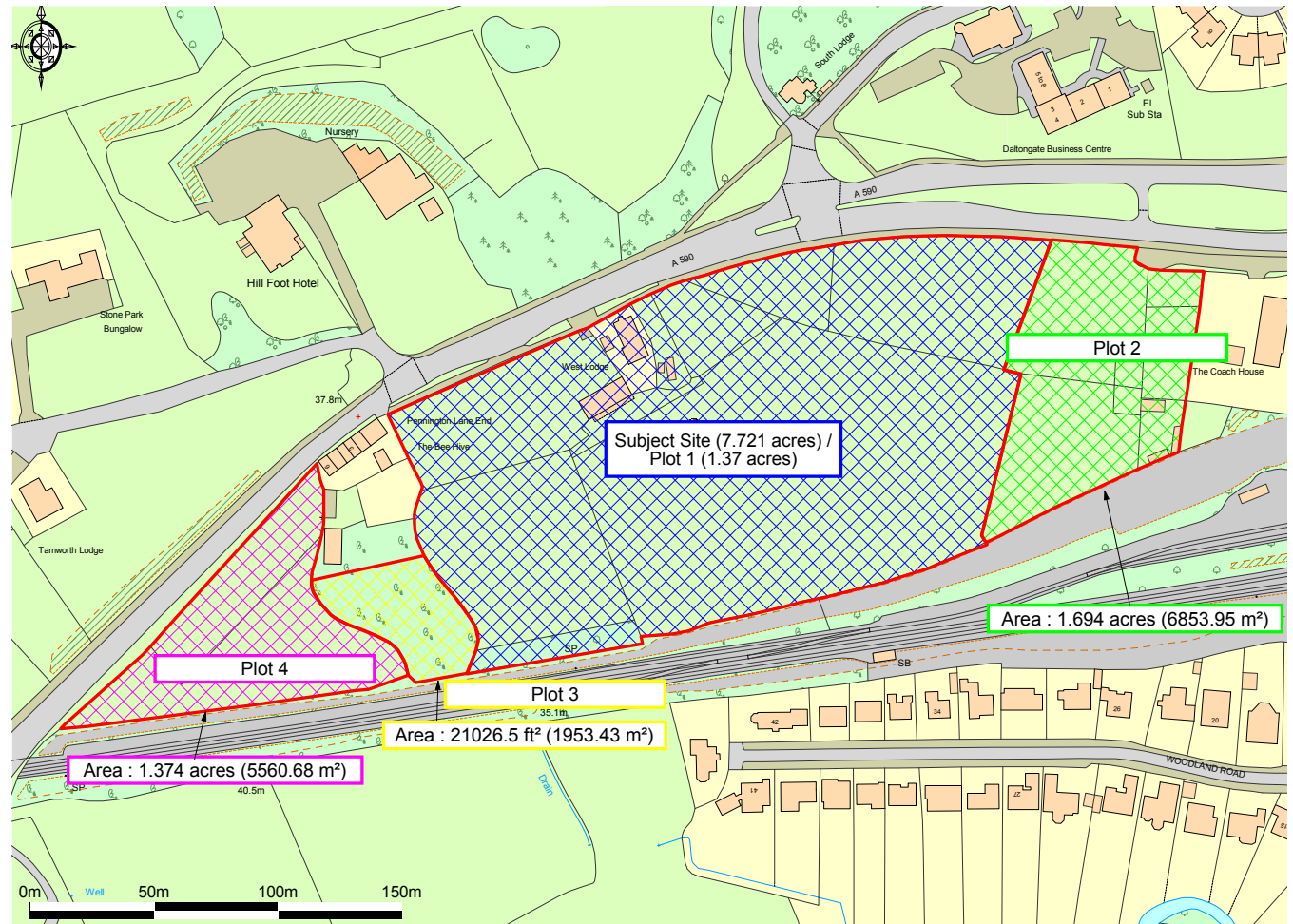
Site Context

1.5 As illustrated in the aerial context plan the site is located on the western side of Ulverston approximately 400 metres walking distance from the nearest part of the site boundary to Lightburn Road and the edge of Ulverston town centre¹. The site is in a sustainable location, is served by public transport and is strongly influenced by surrounding urban development including Lightburn Road to the north (A590) and neighbouring development including Daltongate Business Centre, Hill Foot Hotel and residential properties. To the south is the Ulverston to Barrow-in-Furness railway line and residential properties located on Woodland Road. The site is readily accessible to the surrounding urban area including existing services and facilities in the town such as Ulverston train station.

¹Town Centre Boundary as defined in the Land Allocations DPD Publication Version Proposals Map for Ulverston Town Centre



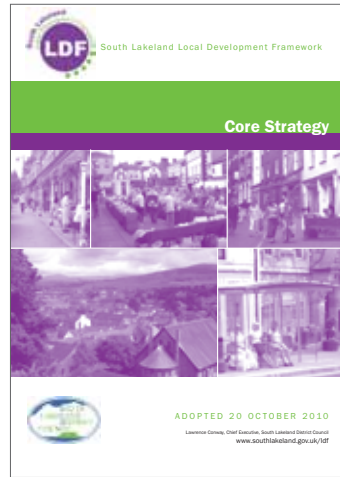
1.6 As demonstrated in the ownership plan the site comprises land in 4 distinct ownerships. RP control the central section (plot 1) and have secured an agreement with SSL to bring this land forward for a Sainsbury's supermarket development. An element of land within plot 1 could also be developed for employment use. The remainder of the site which is promoted for employment development is within private ownership. RP have obtained agreement from the relevant landowners to promote this land for development and to submit these representations.



Site Ownership Plan

2. Planning Policy Context

South Lakeland Core Strategy (Adopted October 2010)



2.1 With regards to the economy in South Lakeland the Core Strategy Spatial Portrait recognises an imbalance in the number of people commuting out of the area to travel to work and that there is a heavy reliance on tourism. The Core Strategy makes reference to the Council's Sustainable Community Strategy which identifies the need to grow the local economy in a sustainable way by supporting local businesses and attracting new investment. It also notes that the supply of employment land needs to be more responsive to demand by providing more sites for new development to encourage the growth of indigenous businesses. The Core Strategy Strategic Objectives also set out to ensure that provision is made for a range of types and sizes of employment land to meet local needs and promote new business creation across the plan area.

2.2 The Core Strategy identifies Ulverston as a Principle Service Centre under Policy CS1.2 and confirms that future development is to be concentrated in these locations. Policy CS1.2 identifies that provision should be made in Service

Centres for 'An appropriate supply of readily available employment land'. The Spatial Strategy for Ulverston and Furness identifies that Ulverston has a unique cluster of high added value, knowledge-intensive engineering jobs that need nurturing. It also recognises that in respect of retailing, a key issue is the leakage of convenience goods expenditure which means that local people are travelling out of Ulverston to shop. It states that this supports the need for further convenience and comparison floorspace in the area.

2.3 Policy CS3.1 outlines the Council's key aims for the Ulverston and Furness area. It identifies that Ulverston will be a location for regeneration, substantial new areas of housing and that the settlement will be 'expanded' to accommodate in the region of 12 hectares of employment development between 2010 and 2025. It also notes that new employment uses should be located in accessible locations and that new office development will be focussed as far as possible in or adjacent to Ulverston town centre.

2.4 Core Strategy Policy CS7.1 confirms that the Council will seek to ensure that around 4 hectares of employment land is allocated per annum and to provide a rolling provision of 5 years worth of 'high quality unconstrained land' for each market sector that is readily available for development at any one time. The quantum of employment land to be provided is to be kept under review in line with a review of employment trends and needs in the area. With regard to the allocation of new employment sites, the policy states that the Council will work with owners and developers in relation to sites with 'surmountable' constraints to bring forth mitigation measures to make them attractive for commercial use.

2.5 Policy CS7.2 sets out anticipated future employment land requirements for the Borough. The preceding text states that whilst it would not be appropriate for the Core Strategy to break down employment requirements by use class type, that there is a requirement to identify B1

allocations in particular, relating to high quality office, research and development and light industrial uses.

2.6 The Core Strategy employment allocations are based on the evidence contained in the Employment Land Study (2005) undertaken by Arup and a 2008 site review undertaken by the Council. The evidence recommended the Council allocate a total of 60 hectares of additional employment land in the Core Strategy split 26% for strategic sites, 32% for business/science parks and 42% for local employment sites. The Core Strategy identifies that the largest site category (local employment sites) is intended to satisfy the local need to provide expansion sites and to encourage local businesses to remain in the area which is a key priority for the Core Strategy thus ensuring ample facilities for new investment.

2.7 Policy CS7.2 states that of the 60 hectares to be allocated, 70% will be for general B use class development and 30% specifically for high quality B1 uses. The policy identifies a total of 13ha of employment land to be developed in Ulverston, 6ha of which is identified to be developed as a 'business/science park'. The Core Strategy identifies that the land at Lightburn Road should be developed for B1 employment use as a high quality employment site aimed at offices/high tech industry.

2.8 Policy CS7.5 sets out the town centre and retailing strategy for the Borough. It confirms that Ulverston is a medium town centre serving a wide rural catchment and that site selection for retail development should follow prevailing national policy. Despite identifying the need to enhance local provision within centres and to encourage sustainable shopping patterns by addressing high levels of leakage to outside areas (which the Core Strategy acknowledges is the case in Ulverston) no retail allocations are identified in the Core Strategy.

Land Allocations Development Plan Document

(Proposed Submission Edition – March 2012)



2.9 The Land Allocations DPD sets out the Council's proposed development locations to cater for the needs of the Borough over the Plan (Core Strategy) period. In reference to proposed employment allocations the DPD notes that there may be instances where mixed use development is justified. Paragraph 2.38 that:

'In some cases, there may be opportunities for mixed-use developments, particularly for office, research and development and light industrial uses which can co-exist with housing and other uses.'

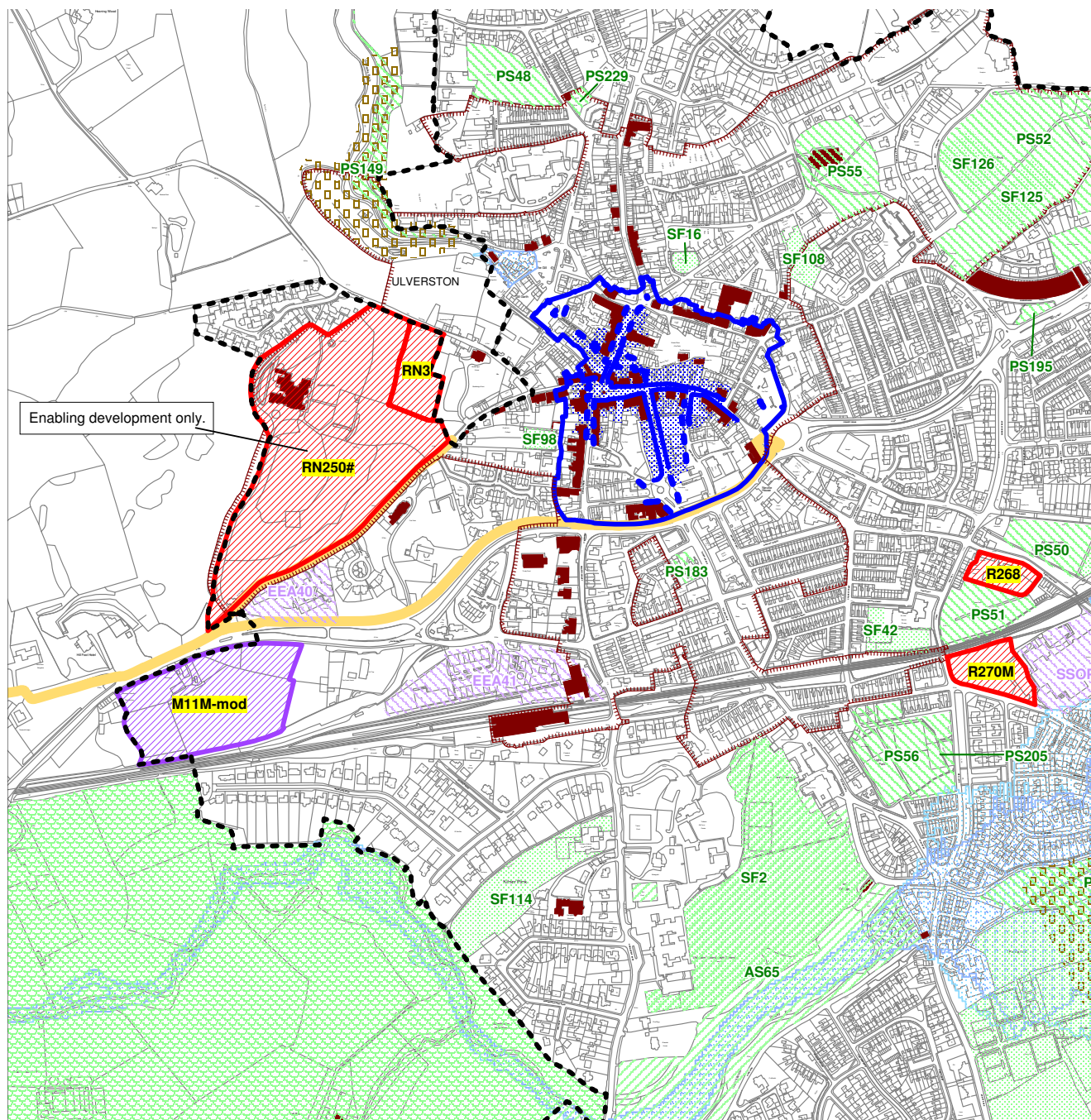
2.10 The DPD identifies 3.1ha of land at Lightburn Road for B1 employment use (allocated for a business park) referred to as 'Lightburn Business Park' (reference: M11M-mod). This is illustrated on the Land Allocations Proposals Map

extract overleaf. It states that this is 'a natural extension of the existing employment areas at Lightburn and Daltongate and is in a sustainable location relatively close to the town centre'. The DPD identifies that B1 uses should be located in accessible locations and that office and knowledge based uses will be favoured on town centre and edge of town sites. In relation to the proposed Lightburn Road employment allocation the DPD also states that:

'Key issues affecting this site are the need for a new access onto the A590, the need for sewerage, the landscaping of this sensitive site at the approach to the town, the need to protect important trees and hedges, the need for green infrastructure, the need to safeguard the residential amenity of Beehive Cottages and the need to safeguard access to the aqueduct. Care will need to be undertaken with the siting of any SUDS (Sustainable Urban Drainage Scheme) if sited at the western end of the site. If storage ponds are located at the western end of the site near to Beehive Cottages they may need to be lined. Any submitted planning application should further investigate the need for such measures and take such technical guidance into account.'

2.11 With regards to retailing the DPD does not promote any sites for new retail development in Ulverston.





Key:

Land Allocated for Development

- ▨ Housing allocation
- ▨ Employment allocation
- ▨ Mixed use allocation
- ▨ Site for other uses
- R1 Site reference number
- ★ Development Brief required for site
- ┌─┐ Development boundary

Land Identified to be Safeguarded

- ▨ Green gap
- ▨ Public open space
- ▨ Amenity open space (no public access)
- ▨ Outdoor sports facilities
- ▨ Historic Parks and Gardens
- ▨ Existing employment site
- ● Protected route of Lancaster Canal (saved Local Plan Policy L12)

Environment and Heritage Designations

- ▨ Conservation Area
- Listed Building
- ▨ Statutory Nature Conservation Sites (SSSI, SAC/SPA, RAMSAR, UK Nature Reserves and LPOs.)
- ▨ Non-Statutory - Other Recognised Biodiversity Sites / Areas of Interest (RIGS, County Wildlife Sites and Verges)
- ▨ UK Priority Habitats
- ▨ AONB
- ▨ Scheduled Ancient Monument

Flood Risk Zones

- ▨ Zone 2: Medium probability
- ▨ Zone 3a High probability
- ▨ Zone 3b: Functional floodplain

Retail

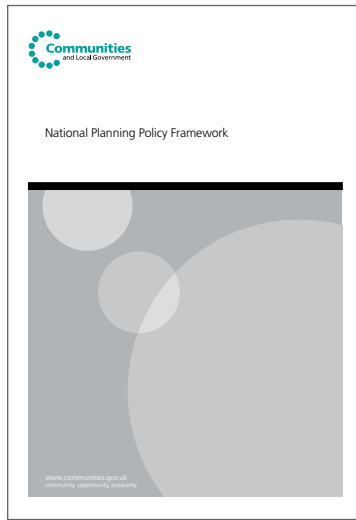
- Primary frontages
- - Secondary frontages
- ▨ Primary shopping areas
- ▨ Town Centre Boundary

Boundaries

- ▨ Lake District or Yorkshire Dales National Park
- ▨ Outside South Lakeland District

Land Allocations Proposal Map Extract: Ulverston North

The National Planning Policy Framework



2.12 The NPPF was published by the Government on 27th March 2012 and replaces old PPG's and PPS documents. The approach and content of the Land Allocations DPD will need to be reviewed in light of the introduction of the NPPF as paragraph 151 confirms that Local Plans must be consistent with the principles and policies set out in the Framework. Paragraph 158 requires Local Plans to be based upon adequate, up to date and relevant evidence regarding economic, social and environmental characteristics and prospects of the area. It also advises that the assessment of, and strategies for development are integrated and take 'full account of relevant market and economic signals'.

2.13 The NPPF positively encourages sustainable development confirming that sustainable development means positive growth. It requires Local Authorities to plan positively for future development needs in their areas and to adopt a presumption in favour of proposals for sustainable development.

The Presumption in Favour of Sustainable Development

14. At the heart of the National Planning Policy Framework is a **presumption in favour of sustainable development**, which should be seen as a golden thread running through both plan-making and decision-taking.

For **plan-making** this means that:

- local planning authorities should positively seek opportunities to meet the development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
 - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
 - specific policies in this Framework indicate development should be restricted.⁹

For **decision-taking** this means:¹⁰

- approving development proposals that accord with the development plan without delay; and
- where the development plan is absent, silent or relevant policies are out-of-date, granting permission unless:
 - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
 - specific policies in this Framework indicate development should be restricted.⁹

Paragraph 14, NPPF (2012)

2.14 The presumption in favour of sustainable development relates to both plan making and decision taking. It requires that LPA's should positively seek opportunities to meet the development needs of their area and that Local Plans should meet objectively assessed needs unless the adverse impacts of doing so would 'significantly and demonstrably' outweigh the benefits, when assessed against the policies in the NPPF or where the Framework indicates development should be restricted.

2.15 The NPPF's Core Planning Principles state that planning should proactively drive and support economic development to deliver development which the country needs. It advises that 'every effort should be made to objectively to identify and then meet the...development needs of an area'. The Principles also encourage mixed use developments and active management of growth to make the fullest possible use of public transport, walking and cycling and to focus significant development in locations which are or can be made sustainable.

2.16 The Framework requires that the economic benefits of proposals are given equal weight in the determination of planning applications and states that growth and new development are necessary to reverse the economic fortunes of the country and to contribute towards economic recovery. The NPPF confirms that the role of planning should be to encourage but not act as an impediment to sustainable growth and that significant weight should be placed on the need to support economic growth through the planning system.

2.17 With regards to retail development the NPPF advises that town centres should be supported in order to support their viability and vitality. It advises LPA's to allocate appropriate sites to meet identified needs firstly within centres where possible, then on the edge of centres and that if sufficient edge of centre sites cannot be identified, to set policies to meet identified needs in other accessible locations that are well connected to the town centre.

2.18 With regards to plan making the NPPF requires that Local Plans should seek opportunities to achieve each of the economic, social and environmental dimensions of sustainable development and that significant adverse impacts on any of these should be avoided and, wherever possible, alternative options which reduce or eliminate such impacts should be considered. Local Plans should be prepared to respond flexibly to changing circumstances. Paragraph 157 advises that Local Plans should also:

- Plan positively for development and infrastructure to meet the objectives, principles and policies in the NPPF
- Allocate sites to promote development and flexible use of land, bringing forward new land where necessary

2.19 In assessing business needs the NPPF advises LPA's to use necessary evidence to understand the need for land or floorspace for economic development including the quantitative and qualitative needs for all foreseeable types of economic activity over the Plan period including retail development. LPA's are also advised to assess the capacity of existing centres to accommodate new town centre development.

2.20 In respect of viability and deliverability of development, paragraph 173 requires Councils to pay careful attention to viability and costs in plan making and decision taking. It notes that plans should be deliverable and that sites and the scale of development identified in the plan should not be subject to obligations or policy hurdles such that their ability to be developed viably is threatened.

2.21 The NPPF requires that Local Plans meet certain tests in order that they can be considered acceptable that crucially they must be 'sound'. The tests of soundness and their relationship with the Land Allocations DPD and specifically the developments needs of Ulverston are considered in further detail in these representations.



3. Delivering Viable Economic Development

3.1 Through the Land Allocations DPD, the Council have identified that land at West Lodge is suitable for development and that it represents a sustainable location capable of meeting development requirements in Ulverston over the Core Strategy period. The Council's aspirations are to deliver employment development in order to meet a number of objectives which include ensuring that the level of growth in the Borough is adequately balanced, to reduce out-commuting, encourage investment and jobs and to provide readily available employment land for local businesses.

3.2 As identified previously RP have promoted the site at Lightburn Road for several years for a mixed use development. RP's proposals have been developed and tested to ensure that they are both deliverable and viable. In this regard RP have commissioned property experts Colliers International (Colliers) to undertake an Employment Land Viability Review comprising a property market overview of Ulverston and a detailed development viability analysis. A copy of this report is attached to these representations.

3.3 The report confirms that in Colliers professional opinion, the site is a suitable location (in market terms) for industrial (B2), office (B1) and retail (A1) development. It also demonstrates that the uptake of employment premises in Ulverston has been subdued in recent years, the office market in the area is currently very limited and that demand for industrial premises is local in nature. Colliers conclude that at the present time, the level of demand supply for employment premises is limited and that future requirements are likely to be for B1 units of between 5,000sqft -10,000sqft. This is corroborated by the Council's own up to date Employment Land Review (ELR)².

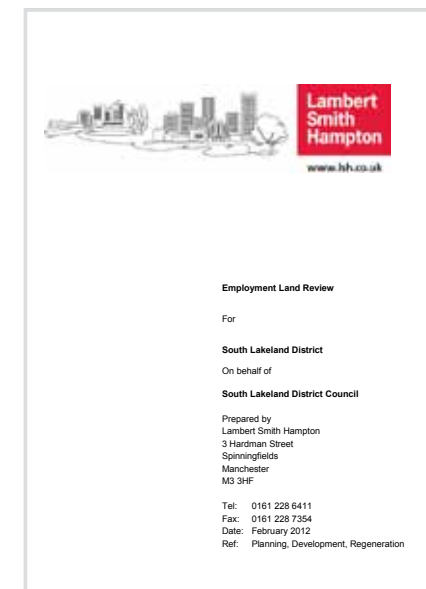
3.4 The Council's ELR recommends that rather than identifying the Lightburn Road site as a strategic business site/business park the site should be directed towards

meeting a range of local employment needs across the 'B' use classes. Importantly it recommends that whilst the site will provide an important resource for future employment development, part of the site may need to be released for 'higher value uses' to ensure its delivery.

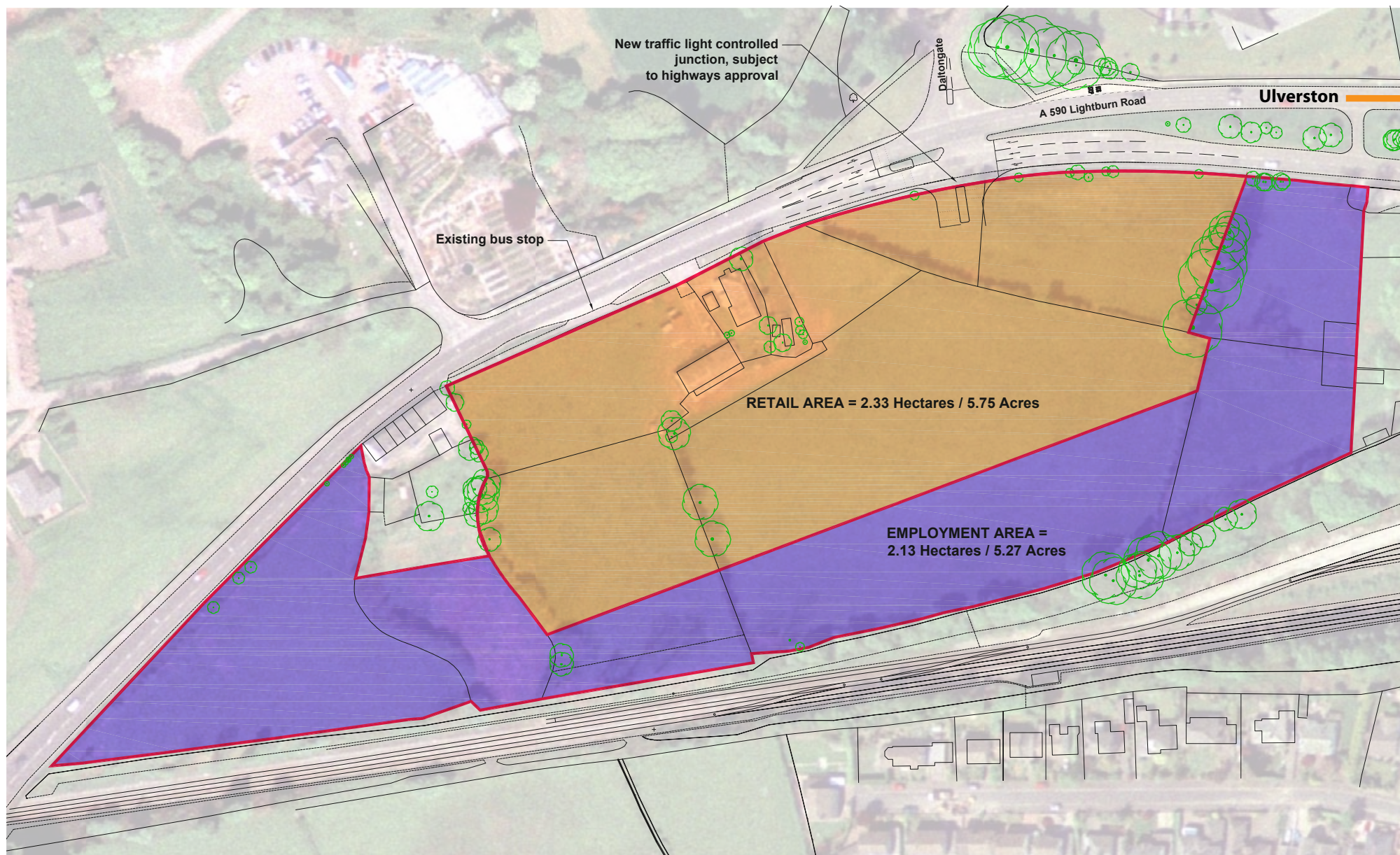
3.5 The conclusion of the Council's independent consultants in this respect is strongly supported by the viability work undertaken by Colliers. Viability appraisals have been undertaken in order to test a number of development scenarios for the site. The appraisals illustrate that developing the site entirely for B1 development would result in a loss of circa £3.3m which is clearly wholly unviable. A major cost to developing the site is the provision of new infrastructure and services which have been conservatively costed at approximately £1.58m. A number of variables are considered in the viability appraisal including the elimination of land costs however even on this basis developing the site wholly for B1 development is still massively unviable (resulting in a loss of circa £1.45m). It concludes that given market conditions this scenario is likely to prevail for at least the next 5 years and possibly longer.

3.6 The major barrier to unlocking the site for development is the provision of infrastructure including the new vehicular junction to the A590, ground works and provision of services necessary to service the entire site. In the current economic climate gap funding is not available therefore the prospects of unlocking the site for employment development are very limited. The viability evidence submitted with these representations demonstrates however, that through the introduction of a higher value use in the form of a foodstore, the necessary subsidy (in the form of site infrastructure) can be delivered to allow employment development to proceed viably. Sainsbury's have confirmed that they wish to deliver this investment in Ulverston and importantly, they are fully prepared to fund the level of infrastructure required to service development of the entire site.

3.7 As set out further in these representations, initial studies have been undertaken by RP which confirm that the site is deliverable in technical terms. As previously identified RP control a substantial element of the site and the agreement of the remaining landowners to promote the site for development has been obtained. The draft site masterplan opposite has been prepared to illustrate how the land at Lightburn Road could be brought forward for a mixed use development comprising a new foodstore and high quality, modern employment development. The site would be accessed via a new junction to the A590 which would include pedestrian and cyclist crossing facilities.



² *Lambert Smith Hampton Employment Land Review, February 2012*



Draft Site Masterplan

Delivering New Jobs

3.8 Importantly the proposals will provide a substantial number of new jobs including approximately 200 jobs associated with the Sainsbury's store. Whilst the retail jobs would not be generated by virtue of 'traditional' B class employment uses they would otherwise meet the aspirations of the Core Strategy to deliver increased employment and investment in the Borough. Subject to the grant of planning consent, the retail development would have the capacity to deliver a substantial number of jobs in the shorter term including a range of full and part time flexible positions. Furthermore, local jobs would be created in construction and additional positions through the supply chain.

3.9 Investment by Sainsbury's to enable the remainder of the site for employment development has the capacity to generate a substantial number of additional jobs. On the basis of the draft masterplan and assuming that the employment development comprises entirely of B1 offices, the site has the capacity to generate up to an additional 432 further jobs³. This would provide a total of 632 jobs overall.

Summary

3.10 This section has demonstrated that development of the site solely for B1 development is wholly unviable and is likely to remain so for many years. A higher value use is required to deliver the necessary investment to secure vital infrastructure. This will open the site up for employment development by removing the major cost barrier to allow new employment development to come forward in line with Core Strategy objectives. The development of a foodstore will also generate a substantial number of new jobs and provide access to skills and training for the local community.

3.11 The following section assesses RP's proposals for the site in the context of the tests of soundness and considers additional evidence in relation to retail capacity in Ulverston.

³ Calculated on the basis of a total of 4323m² B1(a) Development, Homes and Communities Agency Employment Densities Guide (2nd Edition 2010)



4. Meeting the Test of Soundness

Overview

4.1 It has been demonstrated that a higher value use is required to deliver viable development and that substantial employment could be generated in the local area through the new investment proposed. A mixed use employment/retail development has the capacity to provide a viable source of employment land to meet local needs in a much accelerated timeframe than would otherwise be the case.

4.2 In addition to securing these planning benefits this section of the representations demonstrates that a mixed use allocation is necessary in order to ensure that the Land Allocations DPD complies with the Council's most up to date evidence base and critically, the tests of soundness identified at paragraph 182 of the National Planning Policy Framework.

Examining Local Plans

182. The Local Plan will be examined by an independent inspector whose role is to assess whether the plan has been prepared in accordance with the Duty to Cooperate, legal and procedural requirements, and whether it is sound. A local planning authority should submit a plan for examination which it considers is "sound" – namely that it is:

- **Positively prepared** – the plan should be prepared based on a strategy which seeks to meet objectively assessed development and infrastructure requirements, including unmet requirements from neighbouring authorities where it is reasonable to do so and consistent with achieving sustainable development;
- **Justified** – the plan should be the most appropriate strategy, when considered against the reasonable alternatives, based on proportionate evidence;
- **Effective** – the plan should be deliverable over its period and based on effective joint working on cross-boundary strategic priorities; and
- **Consistent with national policy** – the plan should enable the delivery of sustainable development in accordance with the policies in the Framework.

Paragraph 182, NPPF (2012)

The Council's Evidence Base

4.3 The NPPF requires that plans are prepared utilising an up to date evidence base. It should be noted that the Land Allocations DPD Consultation report was approved by SLDC Full Council for consultation on 18th January 2012 however the updated employment and retail evidence reports were not published until the commencement of the consultation period in March 2012. The DPD will need to be reviewed by the Council in view of this more up to date evidence as required by national policy. The tests of soundness and their relationship with the site are considered in further detail below.

The Tests of Soundness

(i) That the Plan has been positively prepared

4.4 Whilst the DPD identifies land at Lightburn Road to be developed for a business/science park, the updated ELR recommends that this site should focus on delivering local employment needs, most notably for B1 but potentially other employment uses. The ELR also recognises that part of the site may need to be released for a higher value use in order to ensure delivery. These representations confirm that this is required. Furthermore the work undertaken by Colliers confirms that the site would be appropriate for B1 and B2 employment uses and for retail development. The Council's identification of land at Lightburn Road to meet employment requirements in Ulverston is entirely appropriate based on the evidence available and is compliant with the requirement to plan positively for development needs in the area.

4.5 With regard to the quantum of employment land required the Core Strategy states that a total of 13ha is needed in Ulverston. The ELR provides an up to date assessment of employment requirements in Ulverston and recommends

that provision for a lower amount of employment land is made, approximately 7.2ha over the plan period. It then identifies a portfolio of favoured sites to meet employment including 3.1ha of land at Lightburn Road. The most up to date evidence produced to support the DPD therefore identifies that land at Lightburn Road will provide an important source of employment land to meet local needs, however, it recommends that the overall employment land requirement in Ulverston is reduced from that identified in the adopted Core Strategy.

4.6 With regards to retail requirements in Ulverston the Council commissioned Nathaniel Lichfield & Partners to produce the South Lakeland Retail Study Update which was published recently (February 2012). In accordance with the adopted Core Strategy this report demonstrates that only 57.7% of convenience retail expenditure generated within Ulverston (identified as zone 9) is retained in the area with the majority (84.4%) being directed to freestanding stores including Booths at Oubas Hill. There is a substantial leakage of convenience retail expenditure to Barrow-in-Furness with regards to convenience retail expenditure.

4.7 It is clear from this up to date evidence that the capacity exists for Ulverston to redress the balance of shopping patterns and retain this leakage through the development of a substantial new foodstore. This is confirmed in the report which states that immediate convenience capacity in Ulverston could accommodate a medium sized foodstore operated by one of the "Big Four" supermarkets or a store operated by a discount retailer. This immediate capacity does not take into account the additional retail capacity which would be generated as a result of the potential for a main store in Ulverston to 'claw back' some of the current expenditure leakage by repatriating retail trips being made to destinations such as Barrow.

4.8 The evidence demonstrates there is a clear need for further convenience retailing facilities in Ulverston as acknowledged by the Council's consultants. The NPPF requires that Council's should assess the needs of business including retail and that land should be allocated where the evidence suggests this should happen. At present the DPD does not address the identified need since it makes no land allocation or other provision.

4.9 In order to meet this need in Ulverston it is necessary to consider potential sites on the basis of the sequential test. The NPPF says that such needs should be met in centre and where no sites are available that edge of centre sites should be considered. If development options do not exist for edge of centre sites then other accessible, well located sites should be considered.

4.10 With regard to meeting the identified convenience goods need in centre, previous representations submitted have identified that there are no available, deliverable or viable sequentially preferable sites within or on the edge of Ulverston town centre. The former Brewery site in the Town Centre is the subject of a planning application for retail development but has received substantial objections from English Heritage due to the impacts upon this important heritage asset. It is understood that the plans for this site are being substantially revised due to significant heritage constraints which require the retention of several key buildings.

4.11 This will mean that any revised scheme will lead to a reduction in the size of the store which was already at the bottom end of the range likely to be acceptable to a main retailer. It is clear that this site cannot provide an appropriate floorplate format to accommodate either a discount retailer or larger foodstore operator and as such does not represent a suitable or alternative site to Lightburn Road in order to meet the need identified in the NLP report. It is also clear that with the very significant infrastructure and other costs associated with this site it would not provide a viable development opportunity for a discount retailer either.

4.12 Land at Canal Head is also recognised as a potential sequential site however it faces a number of substantial development constraints including land ownership issues, significant highways and access complexities and other technical issues. HOW Planning's April 2011 representations should be referred to for further information.

4.13 The NPPF requires the Council to plan positively for the future employment and retail needs of Ulverston. Specifically, paragraph 26 requires that Local Plans should allocate a range of sites to meet the scale and type of retail development needed. Accordingly the failure of the Council to address the need for a store suitable for occupation by one of the major food retailers would render the plan unsound in terms of compliance with the NPPF.

4.14 On the basis of the recent evidence published by the Council, allocation of the West Lodge site to accommodate a foodstore would evidently meet the requirements of the test as there are no suitable sites either within or on the edge of Ulverston to meet the identified retail requirement. It should also be noted that the site would act as a counterbalance and help to reduce expenditure leakage to Barrow and provide for the needs of the new population arising from substantial new areas of housing in Ulverston as identified in the DPD.

4.15 Making provision for retail development as part of a mix of uses would not prejudice the employment objectives of the Core Strategy for Ulverston or the wider area. The proposed allocation would provide approximately 2.1ha of employment land, which, in combination with other identified sites in Ulverston⁴ would comfortably exceed the ELR recommendation to provide a total of 7.2ha of employment land in the area. In reality, the nature of the allocation sought would ensure that the quantum of future employment land in Ulverston is more in line with the recommendations of

⁴ Sites include Phase 1, Low Mill Tannery, Land South of Kennedy Street and Ulverston Canal Head (total combined capacity 8.68ha)



the ELR. As identified previously, a foodstore is required to enable development of the site and will allow the site to come forward to meet anticipated demand for local employment needs.

(ii) The Plan is Justified

4.16 This test requires that the DPD should represent the most appropriate strategy when considered against the reasonable alternatives and based on proportionate evidence.

4.17 The submitted viability evidence demonstrates that development of the site for employment development will not proceed without the fiscal investment in site infrastructure which would be secured by a foodstore investment. Other uses such as housing development would not generate the values required and, in any event, the DPD already makes adequate provision for housing elsewhere in Ulverston to meet identified requirements. There are no other land uses which would be compatible and appropriate in this location to allow delivery of employment development.

4.18 It should also be noted that whilst not representing a traditional B use class, retail development in the form of a foodstore will generate a substantial number of permanent jobs in Ulverston. This is in keeping with the Core Strategy objective to grow the local economy in a sustainable manner and to provide local employment opportunities.

4.19 On the basis of the Councils most up to date employment land and retail evidence base and the unavailability of other suitable and deliverable alternative sites in Ulverston a mixed use retail/employment allocation would be entirely justifiable and in line with the development objectives of the adopted Core Strategy. No other mix of uses than including retail would deliver the viable development of the site for employment development. Therefore it can be concluded that a mixed use allocation as proposed by RP represents the most appropriate strategy when considered against the reasonable alternatives. It is also the case that this is justified on the basis of the most up to date evidence.

(iii) The Plan is Effective

4.20 Allocating all of the land shown in the draft masterplan for mixed use development would ensure the delivery of sustainable development in this location in the shorter term and enable viable development of this land to act as an important resource to meet future local employment needs. This would ensure the effectiveness of the DPD in this respect is maximised.

4.21 In proposing to allocate land at West Lodge for development, the Council have satisfied themselves that the site is an appropriate location for development and that it can be delivered in technical terms. As part of the Emerging Options DPD evidence base the Council prepared a number of 'Fact Files' for the various settlements in the Borough. The Ulverston Fact File confirmed that the entirety of the land at West Lodge (ref. M11M) did not function as part of the Green Gap designation and that it was suitable and appropriate for future development. The Publication Version DPD reduces the proposed allocation on the basis of consultation responses raising landscape objections and heritage issues.

4.22 RP have commissioned a professional technical team to undertake detailed studies across a range of technical disciplines including landscape and heritage issues. This work, which is explored in further detail in these representations demonstrates that development of the entire site indicated in the draft masterplan can be accommodated without giving rise to unacceptable impacts in landscape and heritage terms. Furthermore it has been demonstrated that the development of the wider site can be accommodated in highways terms and that there are no engineering or other technical constraints to development. All of the recommended mitigation measures for the site identified in the DPD can be provided.

4.23 In summary, a mixed use retail/employment allocation is deliverable. Conversely, development of the site solely for employment development would not be deliverable in the foreseeable future and hence a mixed use allocation

should be made. It has been shown that there is no technical reason or other advantage to reducing the scope of the allocation and that appropriate mitigation can be provided where required. It has been shown that the circumstances exist to justify this mix of uses which Paragraph 2.38 of the DPD acknowledges may be required.

(iv) The Plan is Consistent with National Policy

4.24 Whilst it is recognised that the Council have not yet had the opportunity to revise the Land Allocations DPD in light of the policies contained in the NPPF, these representations have demonstrated that the DPD is currently not sound as it fails to meet the requirements of NPPF paragraph 14. Critically the DPD does not plan positively for retail development and specifically convenience needs retailing in Ulverston. The DPD makes no allocation or other provision for this which is contrary to the evidence of the February 2012 Retail Study.

4.25 As currently proposed, allocation M11M-mod does not take account of viability considerations and the costs of delivering infrastructure which the NPPF requires. The allocation requires increased flexibility which a mixed use allocation for retail/employment would achieve thus allowing the infrastructure investment necessary to unlock the site. It has been demonstrated that there are no sequential sites within or on the edge of Ulverston town centre which could accommodate the requirement for a substantial foodstore to meet identified needs. Consequently the mixed use allocation of land at West Lodge would fulfil this requirement compliant with the sequential test. Sainsbury's are proposing a foodstore which is commensurate with the level of need identified in the updated retail evidence and which would be supplemented by repatriating the substantial amount of convenience goods leakage identified.

4.26 It is clear that a mixed use allocation would meet both the convenience goods retailing requirements for Ulverston and would also deliver land for local employment needs. In view of the evidence highlighted previously and otherwise compliance with the NPPF, development of this land for

retail/employment development would not give rise to adverse impacts that are capable of outweighing the benefits of development nor would it otherwise be in conflict with the policies of the NPPF.

4.27 RP's proposals for the site represent a valuable and sustainable economic development opportunity which is precisely in line with the objectives of the NPPF. There is a presumption in favour of such proposals. The proposed mixed use development attracts the clear support of the NPPF which requires Councils to proactively drive and support economic development and to place substantial weight on economic growth. The mixed use development of the entire site identified in the masterplan would clearly deliver sustainable development in line with the policies of the NPPF, thus meeting this test of soundness.

Summary

4.28 This section has demonstrated that the available evidence and other contextual information clearly indicates that RP's proposals for the site meet with the tests of soundness. Principally the DPD requires revision in line with the policies of the NPPF to make provision for local convenience retailing needs in the form of a retail allocation. The DPD does not comply with test (i) in that it has not been positively prepared to meet objectively assessed development requirements.

4.29 It has been shown that to bring the site forward for development a higher value use in the form of a foodstore is required. An alternative mix of uses will not deliver viable development. The proposals will viably unlock the site to meet local employment requirements. The scale of employment land required in Ulverston has been revised downwards from the Core Strategy requirements but the site is confirmed as being required to meet anticipated local employment needs.

4.30 A substantial foodstore development in this location is capable of meeting the sequential test and would therefore be compliant with the retail policies of the NPPF. The Council have concluded that the site is accessible and sustainable. The proposals would

therefore satisfy soundness tests (i) and (ii) in that they will ensure that the DPD makes appropriate provision for development requirements in Ulverston and is fully justified representing the most appropriate strategy on the basis of the available evidence.

4.31 The proposals are deliverable both in fiscal and technical terms. There is no sound technical justification to the proposed reduction in the extent of the site allocation and therefore land to the west of allocation M11M-mod should be reinstated as part of the allocation. Land to the east, which is also available for development as identified in these representations should also be incorporated to maximise the planning benefits of development. The proposed allocation would meet the third test of soundness as being demonstrably deliverable (flexible) and hence effective.

4.32 For the reasons identified above, it would also be compliant with national policy in the form of the National Planning Policy Framework. The following sections confirm the changes which are sought to the Publication Version Land Allocations DPD and provide further technical information in relation to the site.

5. Changes Sought to the DPD

5.1 Viability information has demonstrated that a higher value use is required to deliver the site for employment use. The mixed use allocation of this land for a foodstore and employment development would deliver immediate benefits in terms of retail job opportunities in the new foodstore and enable the remainder of the site to provide for local employment needs.

5.2 Evidence has been recently published by the Council in relation to employment and retail issues which was not available to the Local Authority during the preparation or examination of the adopted Core Strategy over 2 years ago. The DPD should be reviewed and amended to ensure that full provision for development requirements is made.

5.3 Very up to date evidence justifies a change to the proposed allocation “M11M-mod” to incorporate a higher value use. There is a pressing requirement for a substantial foodstore in Ulverston which the DPD does not currently address. It has been shown that accommodating this requirement on the land at West Lodge will meet the employment and retail objectives of the adopted Core Strategy and would be fully consistent with the NPPF’s requirement for soundness and other national policies controlling the location of retail development. The DPD and its approach to positively meeting development requirements in Ulverston should therefore be amended and the following change made:

Draft Policy LA1.7: ‘Business and Science Park Sites’ should be amended so that in addition to B1 development being listed as an acceptable use the DPD should also make reference to the requirement for ‘A1 retail development’ in the form of a new foodstore which is essential to the viable and timely delivery of much needed economic development in Ulverston. The allocation should be expanded to include all of the land identified in the enclosed masterplan which is available for development.

5.4 This change is entirely justified on the basis of very up to date evidence. The Council have rightly concluded that none of the site performs a role as Green Gap and therefore the entire site should be allocated in order to maximise the benefits of sustainable development and economic growth to Ulverston. To ensure compliance with the tests of soundness, the allocation should be revised as identified.



6. Technical Considerations

Overview

6.1 RP have commissioned a range of technical consultants to assess the site and to ensure that development is delivered in a technically acceptable and sustainable manner. Key technical issues are summarised in this section. The technical appendix to these representations should also be referred to for further information.

Landscape and Visual Considerations

6.2 Initial studies have identified that an appropriate strategy for re-grading of the site topography would be required to accommodate development and that substantial landscape mitigation will also be proposed as part of this. Work undertaken to date has identified the proximity and sensitivity of heritage assets and other buildings and locations which have potential views of the proposed development.

6.3 The assessment has included a comprehensive Tree Survey, an assessment of landscape character as well as the visibility of the development proposed. This exercise has identified that the site is overlooked by several prominent buildings forming the current edge of the Ulverston built up area including Dalton Conference Centre to the north, new areas of housing and individual buildings such as residential dwellings.

6.4 The proposed mixed use allocation site is overlooked by existing development within the immediate vicinity however beyond this it has been concluded that the local topography and tree cover combines to obscure the site at ground level from most directions. To mitigate for potential views of the development (which have been identified as being mostly longer range) a series of 'buffer zones' will be provided to create tree and shrub belts to screen the development with a

particular focus on more sensitive locations such as adjacent to existing properties.

6.5 The proposals will promote a land regrading strategy and landscape screening will be provided to limit views of the development to the more sensitive boundaries of the site including towards the west. Work undertaken has shown that the entire site can be developed without giving rise to unacceptable landscape impacts.

Traffic and Transport

6.6 The Technical Appendix submitted with these representations demonstrates that it is proposed to upgrade the existing Lightburn Road/Daltongate priority junction to provide a signal controlled access arrangement in to the West Lodge site. This main access will be utilised for pedestrians and vehicular access. Servicing for the Sainsbury's store will be from a separate access point to the west of the main access point connecting directly with the A590. Further discussions will be undertaken with SLDC and Cumbria County Council to agree the precise details of the access arrangements.

6.7 Initial studies show that the proposed mixed use development of the site can be satisfactorily accommodated on the existing highway network in capacity terms without the requirement for mitigation works to the A590. It has also been shown that the proposed new junction can adequately serve both the scale of retail and employment development proposed.



Design

6.8 Sainsbury's propose that the new foodstore would promote a contemporary design that is in keeping with the character of the local area and distinctive to Ulverston. This would result in the delivery of a high quality building utilising materials appropriate to the character of the area including for example the use of local stone.

6.9 Details of the employment development have not been finalised however these are envisaged as being a maximum 2 storeys in height comprising a mix of smaller pavilion style units. Buildings would be of an appropriate mass and scale in keeping with surrounding development and would include a substantial amount of high quality landscape planting informed by the landscape and visual studies which would help to create an attractive environment.

Sustainability

6.10 Sainsbury's have a robust and challenging Corporate Responsibility Strategy which requires implementation of energy efficiency technologies and sustainability techniques in all new stores. The new Ulverston store would commit to the principle of investment in energy efficiency and reduction in carbon emissions. Investment in energy efficiency measures has been determined by Sainsbury's as the most commercially and technically viable approach to achieving significant reductions in carbon emissions.

6.11 A number of energy efficiency measures will be utilised in the store including a rainwater harvesting system, lighting controls, use of LED lighting, re-utilisation of cold air from chillers as air conditioning and the implementation of a full store Building Management System to intelligently manage energy use. In addition Sainsbury's propose that the Ulverston store would incorporate a biomass boiler utilising wood chip or pellets as fuel to provide energy for the store

in the form of hot water and heating for the customer sales area. Air Source Heat Pumps are also proposed to provide heating and cooling to the customer areas of the store.

6.12 The employment development will be constructed in line with sustainability and energy efficiency requirements according to the appropriate building regulation standards.



Heritage Considerations

6.13 The key heritage considerations for the site are as follows:

- The site to the south of Lightburn Road comprises no designated or non-designated heritage assets. Traditionally open agricultural land, the site is outside the boundary of Ulverston Conservation Area and is distanced from the sensitive historic core of the town.
- The most significant elements of the landscape setting of Ulverston Conservation Area include the hill range to the north of the town centre and, in particular, the Barrow Monument on Hoad Hill to the north west. The site, to the south of Lightburn Road, occupies an area of landscape that has a limited visual or historic relationship with the conservation area.
- Hill Top is a grade II listed building and of significance as the residence of a wealthy Ulverston resident. It is an elegantly proportioned building placed at the crest of a hill along Lightburn Road and was subject to extensions and embellishments that also contribute to its significance. Whilst Hill Top was intended to overlook the landscape to the west to some degree, the house is particularly related to its intimate and well defined immediate setting comprises of enclosed private grounds with the main facade of the house orientated towards and overlooking the designed garden to the east. There is no evidence of a historic or functional relationship with land to the west. It is separated from the site by fencing and planting that creates enclosure and limits interaction between the two areas.
- Dykelands is significant as a fashionable middle class villa situated within its own secluded grounds. It is designed in one of the most fashionable styles of the period and is likely to have been a commission for the famous Cumbrian architect, George Webster. Dykelands is located further from the site than Hill Top and is separated from the site by the Furness railway line. As with Hill Top, the setting of Dykelands is well defined and



1. Hill Top



2. Dykelands



Land at West Lodge, Lightburn Road, Ulverston

Technical Appendices

Supporting the Representations to the South
Lakeland District Council Land Allocations DPD
(Proposed Submission Version)

April 2012

On behalf of On behalf of
Rawdon Property and
Sainsbury's Supermarkets Limited



TURLEY ASSOCIATES



Appendix 1

Highways Technical Summary



PROPOSED FOODSTORE AND EMPLOYMENT DEVELOPMENT, LAND AT WEST LODGE, LIGHTBURN ROAD, ULVERSTON

Introduction

This Technical Note has been prepared to assist representations submitted on behalf of Sainsbury's Stores Limited in relation to land located at West Lodge, Lightburn Road, Ulverston. Representations have been previously submitted to the Councils Land Allocations Emerging Options Consultation Development Plan Document in April 2011 promoting this land for mixed use development comprising a new foodstore and modern, high quality employment floor space. These previous representations sought an amendment to the proposed DPD employment allocation (ref: M11M) in order that it should identify this land as a mixed use retail/employment site.

This document provides information regarding the technical compliance of the development proposals in transport terms, together with identifying the key highways and transportation benefits of the scheme. The document assesses the sites accessibility by sustainable forms of travel to demonstrate its accordance with pertinent planning policy guidance including the National Planning Policy Framework and the emerging South Lakeland LDF and Cumbria LTP, which promote reducing the need to travel, promoting sustainable forms of travel, and preserving the operational capabilities of the existing highway network.

On the basis of the analysis presented in this report it is concluded that the site represents a sustainable economic development in transport terms for the following reasons:

- The site is accessible by a variety of non-car modes of travel, and would provide the opportunity to enhance existing provisions;
- The development of a foodstore on the site would reduce the trade leakage currently experienced in Ulverston, thus providing the environmental benefits of reduced journey times, distances and greenhouse gas emissions;
- The foodstore development would deliver the highway infrastructure necessary to deliver employment land uses on the site;
- The traffic generated by the development can be accommodated on the local highway network, as well as providing residual benefits to sections of highway which are capacity constrained, and represents the most suitable site in Ulverston to site a foodstore and employment development.

Baseline Conditions

Existing Highway Network and Travel Patterns

The development site is located on the southern side of the A590 Lightburn Road, approximately 400 metres to the west of Ulverston town centre. The majority of the site is currently undeveloped, with a single property located to the east of Pennington Lane. Frontage activity on the A590 is limited to this single residence, which takes direct access.

The A590 Lightburn Road in the vicinity of the site forms a dual carriageway in an eastbound direction with a single carriageway provided in a westbound direction. The A590 is subject to a 40mph speed limit, with street lit footways present on both sides of the carriageway. The Lightburn Road/ Daltongate priority junction provides a dedicated right turn lane for traffic exiting the A590.

The A590 is a relatively heavily trafficked route, and while traffic flow conditions in the direct vicinity of the site are currently free flowing there are known to be capacity issues at peak hours towards Ulverston town centre. In particular the section of the A590 to the east of the town centre between the junction with North Lonsdale Terrace and the roundabout junction with Next Ness Lane, which provides access to the Booths supermarket, is noted to be congested and approaching capacity.

There are no known traffic problems on the local road network away from the A590.

With regards to the baseline retail travel patterns in Ulverston the February 2012 South Lakeland Retail Study which was produced by Nathaniel Lichfield & Partners demonstrated that only 57.7% of convenience retail expenditure generated within Ulverston was retained in the area, with the majority (84.4%) being directed to freestanding stores including Booths on Next Ness Lane. The report also concluded that there is a substantial leakage of retail expenditure to Barrow in Furness to the west of Ulverston. In transport terms this leakage of trade results in longer journey distances and times and increased greenhouse gas emissions.

Accessibility by Sustainable Forms of Travel

The development site is located within a comprehensive pedestrian network, with street lit footways providing links between the site and Ulverston town centre.

East and westbound off-carriageway bus stops are located on Lightburn Road in the vicinity of the site, although there is currently no infrastructure provided at either location. From these stops frequent weekday and weekend services are operated to Ulverston town centre and destinations including Croftlands and Dalton in Furness. However, no pedestrian facilities are currently provided to serve links from the south of Lightburn Road to the eastbound bus stop.

A summary of the buses operated on Lightburn Road in the vicinity of the site is provided in **Table 1** below.

Service No	Route	Mon – Fri Frequency per hour				Sat	Sun
		AM Peak	Midday	PM Peak	Evening		
6/ 6A	Croftlands-Ulverston-Dalton in Furness-Barrow	3	3	2	2	2/3	2
618	Barrow-Ambleside	1 bus/ 2hours	1 bus/ 2hours	1 bus/ 2hours	0	1 bus/ 2hours	0
X35	Barrow-Ulverston-Grange-over-Sands-Kendal	0	1	1	1 bus/ 2hours	1	3 jnys

Table 1 –Summary of Lightburn Road Bus Services

Ulverston railway station is located approximately 750 metres to the south east of the development site and can be safely reached utilising the existing pedestrian network. From Ulverston station hourly services are operated during the network peak hours to destinations including Dalton in Furness, Cark and Cartmel, Grange-over-Sands and Arnside.

The development site is therefore concluded to be well located to encourage trips to be undertaken by sustainable forms of travel, thus helping to reduce the reliance on the private motor vehicle in line with national and local planning policy guidelines.

South Lakeland District Council Land Allocations Development Plan Document DPD

As part of the SLDC Land Allocations DPD in February 2012 KR Synergy consultants produced a document entitled 'Traffic Study to Inform Land Allocations DPD for Ulverston and Swarthmoor'. This document formed a high level study of the potential traffic impacts arising from the future development of draft proposed allocation sites located in and around Ulverston and Swarthmoor. This included 14 sites identified for residential development and 3 sites for employment land uses.

The study concludes that traffic levels continue to grow on the A590 and that congestion will become a problem in relation to the eastern section between the Quebec Street and Booths roundabout irrespective of any development related traffic. However, the document states that this section of highway will also be subject to substantial increases in traffic as a result of a number of development sites. However, the document states that rather than identifying mitigation measures specifically aimed at the capacity problems on this section of the A590 it would be preferable to identify a Transport Strategy for the area which could provide more widespread benefits.

As part of the potential Transport Strategy the document states that if Ulverston is to fulfil its aspirations of economic growth and development then improvements to accessibility are needed across all modes of travel, which will involve optimising the use of the car and providing alternatives to single occupancy car travel including:

- Ensuring that the transport network can respond to changes in development and the local economy;
- Promoting choice to local residents by providing alternatives, particularly for those without access to a car; and
- Reducing the impact that transport has on the environment by maximising technological advances and making better use of resources.

The document also concludes that as Ulverston is a relatively rural area car use already has a considerable attraction, particularly as existing bus services are limited. If this existing imbalance between car and other more sustainable modes of travel is to be addressed then a step change is required in the public transport network in Ulverston, which will need to incorporate both service and infrastructure improvements.

Development Proposals

This report considers the traffic impact of developing land at Lightburn Road for a mixed use development comprising a new foodstore and high quality, modern employment development. An indicative site layout is provided with these representations.

The foodstore proposals include:

- A new Sainsbury's foodstore of approximately 3,549sqm (gross internal floor area) which will provide for mainly convenience goods retailing to meet local identified needs.
- An associated 6 pump petrol filling station.
- A new signal controlled highways junction to the A590 which will include crossing facilities for pedestrians and cyclists. It is proposed that the existing Lightburn Road/ Daltongate priority junction be upgraded to a signal controlled layout, with a fourth arm introduced on the southern side of the junction to provide vehicle access to the development site. The site access arm of the junction will provide separate left/ahead and right turning lanes.
- A secondary priority controlled junction with the A590 Lightburn Road to provide access to the foodstore service area. This junction is to be located approximately 125 metres to the west of the main site access. Further discussions are required with the highways authority to agree this arrangement.

The development of the new Sainsbury's store would provide the new highways access into the site, together with associated utilities and internal road infrastructure, to allow the remainder of the site to be unlocked for employment development.

The masterplan submitted with the representations illustrates this employment development occupying 10 separate units to the east and west of the foodstore. As highlighted in the main representations, the land to accommodate the proposed employment development will only be accessible and deliverable as a result of the implementation of the main site access and internal highway infrastructure works associated with the foodstore.

The masterplan submitted with the representation assumes that the employment units will be constructed as single storey buildings with an approximate total ground floor area of 4,323sqm. However, to provide a robust analysis it has been assumed for the purposes of this assessment that all office space would accommodate B1 type land uses, and could potentially be constructed to two storeys, thus equating to a total gross floor area for the employment development of 8,646sqm.

Pedestrian access to the both the foodstore and employment land uses will be achievable from the main site access junction, with a dedicated pedestrian link into the site from the A590 also provided adjacent to the foodstore frontage. The signalised site access junction with Lightburn Road and Daltongate will also provide controlled pedestrian facilities on the Lightburn Road arm of the junction which will serve pedestrian links between the development site and the eastbound bus stop on the A590.

In this regard the development of this site also offers the opportunity to enhance public transport provision in the vicinity of the site. The existing east and westbound bus stops on Lightburn Road currently offer no infrastructure with the exception of off-carriageway lay-bys. These stops could be upgraded to include well lit shelters offering seating and timetable information.

In addition, there are two bus services, (the 510 and 511 services) which Cumbria County Council have recently been forced to end due to funding cuts. A mixed use development on this site would generate an increased demand for public transport services to the west of Ulverston such that it may be feasible to introduce a new service that could also serve destinations which have had their public transport accessibility affected by the recent service cuts.

These public transport measures would have a positive impact upon travel patterns by encouraging increased public transport patronage, and would act in accordance with the recommendations of KR Synergy's Traffic Study for SLDC by helping to improve local bus services and infrastructure to help address the imbalance between the car and more sustainable modes of travel.

The proposals will provide a substantial number of new jobs including approximately 200 jobs associated with the Sainsbury's store. The DPD identifies the site for development of a B1 business park type development. Unlocking the remainder of the site for this kind of employment development has the capacity to generate up to 432 further jobs in this category on the basis of the site masterplan. The location of a substantial number of new jobs close to Ulverston town centre and in a location accessible by public transport has the potential to reduce employment journey times and distances, and thus vehicle emissions, in accordance with national and local planning policy guidelines.

Traffic Impact Assessment

This traffic impact assessment has been prepared in accordance with the Department for Transport's documents 'Guidance on Transport Assessments' and 'Circular 02/2007 – Planning and the Strategic Road Network'.

Baseline Traffic Flows

The analysis has considered the operation of the proposed signalised site access junction with the A590 Lightburn Road and Daltongate. Baseline traffic flows at this junction were surveyed on Friday 23rd and Saturday 24th March 2012, with the peak hours calculated from these surveys as 1600-1700 for the weekday PM peak and 1130-1230 for the Saturday peak hour. The 2012 Baseline traffic flows are provided in **Figures 1** and **2** for the PM and Saturday peak hours respectively.

Assessment Years

Given that the A590 Lightburn Road forms part of the strategic road network the traffic impact of the development proposals has been assessed for a 2022 future year scenario, which is in accordance with Circular 02/2007 guidelines.

Traffic growth factors have been derived using the National Transport Model (NTM), with adjustments made for local variants using the TEMPRO database. The NTM forecasts include anticipated future residential and economic developments, and therefore would implicitly include traffic growth related to the DPD allocated sites in Ulverston and Swartmoor.

The 2022 Baseline traffic flows are provided in **Figures 3** and **4** for the PM and Saturday peak hours respectively.

Trip Distribution

Development traffic relating to the foodstore element of the development has been distributed based upon surveyed traffic proportions at the Lightburn Road/ Daltongate junction, which is considered reasonable as the majority of trips to the foodstore during peak times are likely to be associated with existing trips on the wider network. The foodstore trip distribution is illustrated in **Figures 5** and **6** for the PM and Saturday peak hours respectively.

Trips to the employment element of the development have been distributed based upon the location of residential developments considered in the DPD (by number of the units) which is the methodology adopted by KR Synergy in the 'Traffic Study to Inform Land Allocations DPD for Ulverston and Swathmoor' document. The employment trip distribution is illustrated in **Figure 7** for the PM peak hour. It has been assumed that the employment element of the development will not generate a material volume of trips during the Saturday peak hour.

Trip Generation

Trip attractions for the proposed development have been derived through an interrogation of the TRICS database. The resultant trip rates and trip attractions are presented in **Table 2** below.

		PM Peak (1600-1700)		Sat Peak (1130-1230)	
		Arrivals	Departures	Arrivals	Departures
Foodstore	Trip Rate /100sqm	6.632	6.453	8.330	8.178
	Trips	235	229	296	290
B1 Office Development	Trip Rate/ 100sqm	0.242	1.022	0.000	0.000
	Trips	21	88	0	0

Table 2 - Proposed Development Trip Rates and Trip Attractions.

To provide a robust assessment it has been assumed that all trips relating to both the foodstore and employment elements of the development are new to the local highway network, and that there is no cross-visitation between the two uses.

However, it is widely recognised that new foodstore developments do not typically result in a significant increase in vehicle trips on the surrounding highway network, but rather the majority of trips will either be existing retail trips transferring from other competitor stores (in this instance most notably the Booths store to the east of Ulverston town centre, and foodstores in Barrow in Furness), or existing pass-by and diverted trips which are already on the local network and stop at the foodstore at the intermediary leg of a wider journey.

As such, in reality the traffic impact of the foodstore on the highway network in Ulverston, in terms of new trips, would be expected to be significantly lower than that suggested in **Table 2**. This means that the conclusions of the KR Synergy's traffic study, where the site was assessed as purely an employment development, would not be materially altered through the inclusion of a foodstore on this site, and that the following capacity analysis of the site access junction is considered to be particularly robust.

The foodstore development trips are illustrated in **Figures 8 and 9** for the PM and Saturday peak hours respectively. The employment development trips are provided in **Figure 10** for the PM peak hour.

The foodstore and employment development trips have been added to the 2022 Baseline trips to generate the 2022 Baseline with Development trips. These are presented in **Figures 11 and 12** for the PM and Saturday peak hours.

Junction Capacity Assessment

The operational capacity of the proposed signalised site access junction with Lightburn Road and Daltongate has been assessed using the LINSIG 3 programme, which is the industry standard package for assessing isolated signal controlled junctions.

The junction has been assessed for the 2022 Baseline with Development scenario, with the results of the capacity assessments provided in **Table 3** below

Lane	Weekday PM Peak		Saturday Peak	
	Deg of Sat (%)	Queue (Veh)	Deg of Sat (%)	Queue (Veh)
Lightburn Road East (L/A)	58.4	10	53.5	9
Lightburn Road East (A/R)	62.0	12	56.8	10
Site Access	85.6	8	71.9	5
Lightburn Road West (L/A)	84.0	22	74.5	16
Lightburn Road East (A/R)	24.1	2	27.9	3
Daltongate	13.8	1	11.2	1

Table 3 –Site Access/ Lightburn Road/ Daltongate LINSIG Assessment Results

The results of the capacity assessments indicate that the junction is predicted to operate within capacity and without significant levels of queuing during both the PM and Saturday peak hours. However, it is important to reiterate that the assessments have been conducted based upon particularly robust assumptions regarding trip types and as such in practice the junction would be expected to operate with a materially greater degree of spare capacity than these results suggest.

The junction is therefore considered of an appropriate form to serve the foodstore and employment development.

Residual Traffic Impact

While it has been demonstrated that the proposed site access junction is of an appropriate form to accommodate the foodstore and employment development without a materially detrimental impact upon the A590, there will also be additional residual highway benefits to developing a foodstore on the development site.

The location of a foodstore on the western side of Ulverston will have the additional benefit of acting to balance traffic flows in Ulverston, particular against the Booth's foodstore at Oubas Hill to the east of the town centre.

As previously mentioned it is forecast that the development of a foodstore on this site would draw trade from other competing foodstores in Ulverston, including the Booths store on Next Ness Lane. The effect of this trade draw from Booths would be to reduce the volume of traffic travelling on the section of the A590 to the east of Ulverston town centre between North Lonsdale Terrace and Booths roundabout which the KR Synergy traffic study has identified as being the critical stretch of the A590 with regards highway capacity.

The development of a foodstore on the development site would therefore allow this capacity constrained section of carriageway to operate with a greater degree of spare capacity, with trips then diverted to the west of Ulverston where the KR Synergy report suggests that junctions are able to operate with a greater degree of spare capacity. The development would therefore result in a more efficient use of existing road space.

In addition, as previously outlined the 2012 South Lakeland Retail Study highlighted the degree of trade leakage which was currently experienced in Ulverston, with only 57.7% of convenience retail expenditure generated within Ulverston retained in the area. The development of a new foodstore to the west of the town centre will help to reduce this leakage by retaining a greater proportion of retail expenditure in Ulverston. This will have the associated benefits of reducing the length of trips that people undertake when making a food retail trip, which will have accompanying benefits in reducing greenhouse gas emissions.

In this regard it is particularly noteworthy that the substantial volume of existing food retail trips which are presently leaked from Ulverston to Barrow in Furness would already travel along the A590 corridor adjacent to the site. As such the transfer of these existing trips to the development site would in effect have no material impact on the local highway network.

These residual highway benefits add further support to the conclusion that the proposed site is the optimum location for a new foodstore in Ulverston based upon travel demands.

Conclusions

On the basis of the analysis presented in this report it is concluded that the site represents a sustainable economic development in transport terms for the following reasons:

- The site is accessible by a variety of non-car modes of travel, and would provide the opportunity to enhance existing provision, in particular public transport services and infrastructure;
- The development of a foodstore on the site would reduce the trade leakage currently experienced in Ulverston, thus providing the environmental benefits of reduced journey times, distances and greenhouse gas emissions;
- The transfer of retail trips leaked from Ulverston to Barrow in Furness to the proposed foodstore would have no material impact on the local highway network as these would already pass the site on the A590 when travelling to Barrow-in-Furness.
- The site access junction is of an appropriate form, and provides sufficient capacity, to serve the development without causing material delay to the A590;
- The foodstore development would deliver the highway infrastructure necessary to deliver employment land uses on the site;
- The traffic generated by the development can be accommodated on the local highway network, as well as providing residual benefits to sections of highway which are capacity constrained. In particular the transfer of trips from the Booths store on Oubas Hill to the proposed foodstore will help to reduce traffic flows on the critical stretch of the A590 between North Lonsdale Terrace and Booths roundabout. The development would therefore allow a more efficient use of existing road space.

The development site is therefore concluded to represent the most suitable site in Ulverston for a new foodstore and employment development.

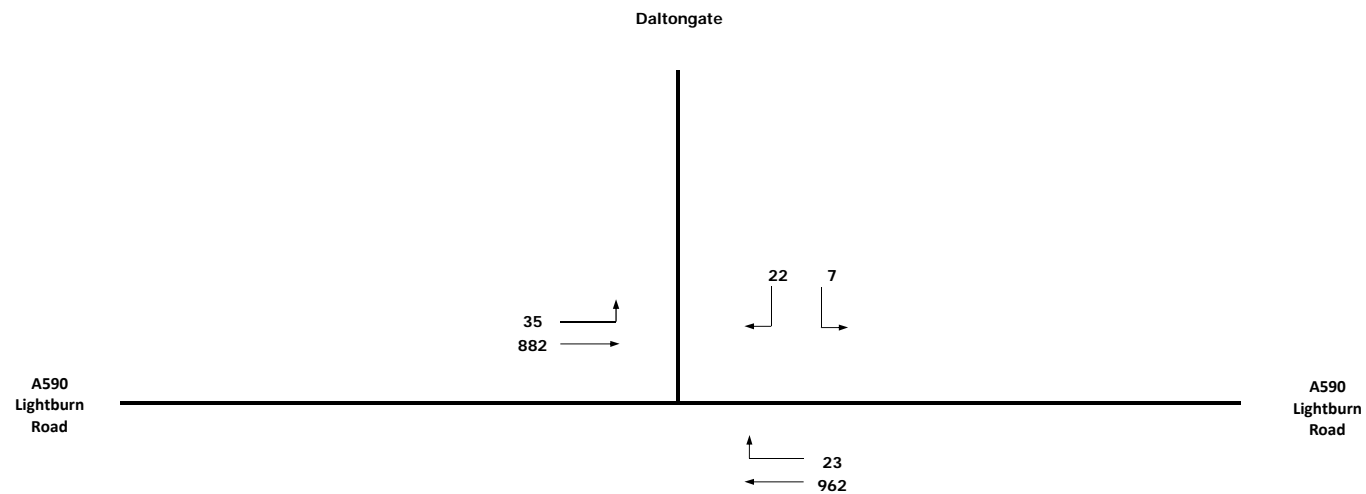


Figure 1 2012 Surveyed Traffic Flows
Weekday PM peak hour (1600 - 1700)

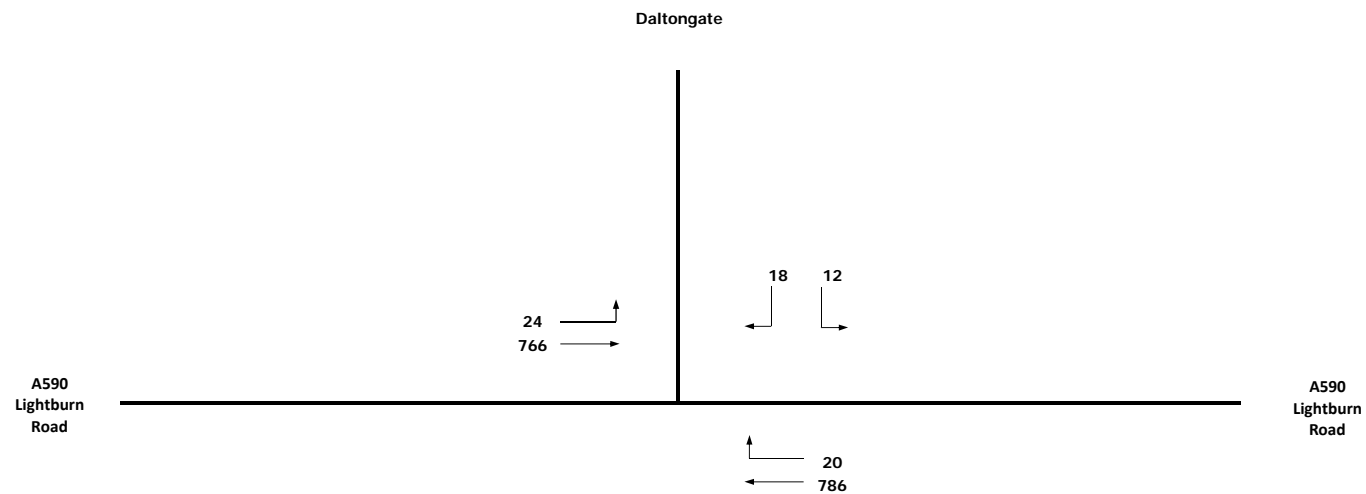
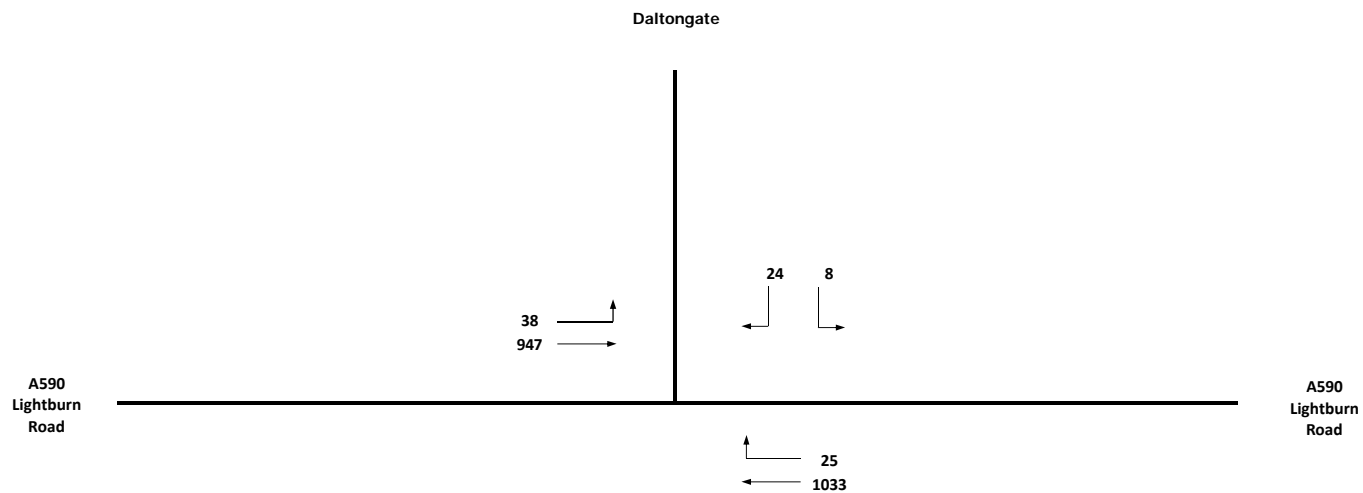
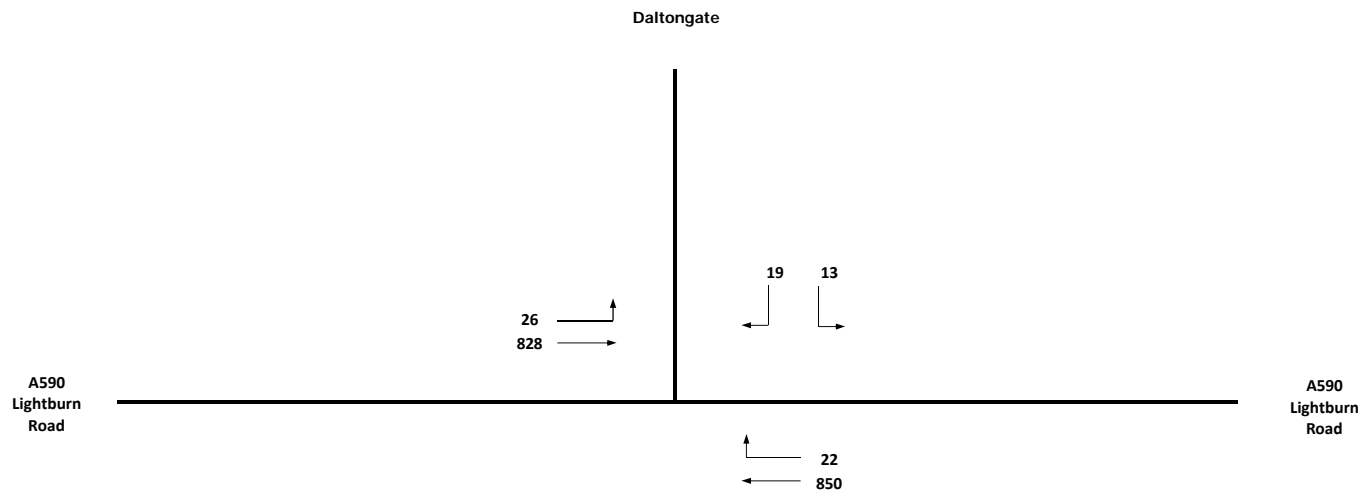


Figure 2 2012 Surveyed Traffic Flows
Saturday peak hour (1130 - 1230)



2012 - 2022 NTM Medium Growth Factor 1.0738

Figure 3 2022 Surveyed Traffic Flows
Weekday PM peak hour (1600 - 1700)



2012 - 2022 NTM Medium Growth Factor 1.0809

Figure 4 2022 Surveyed Traffic Flows
Saturday peak hour (1130 - 1230)



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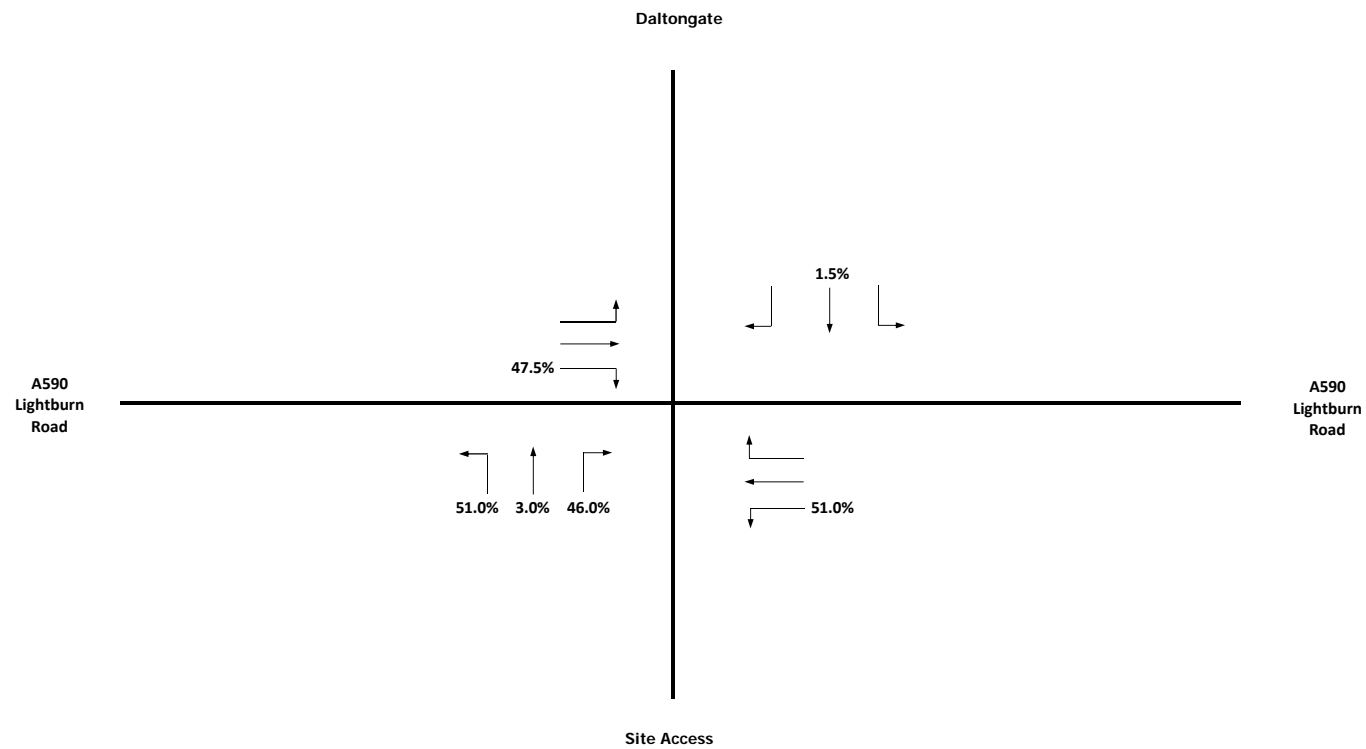


Figure 5 Sainsbury's Foodstore Trip Distribution
Weekday PM peak hour (1600 - 1700)

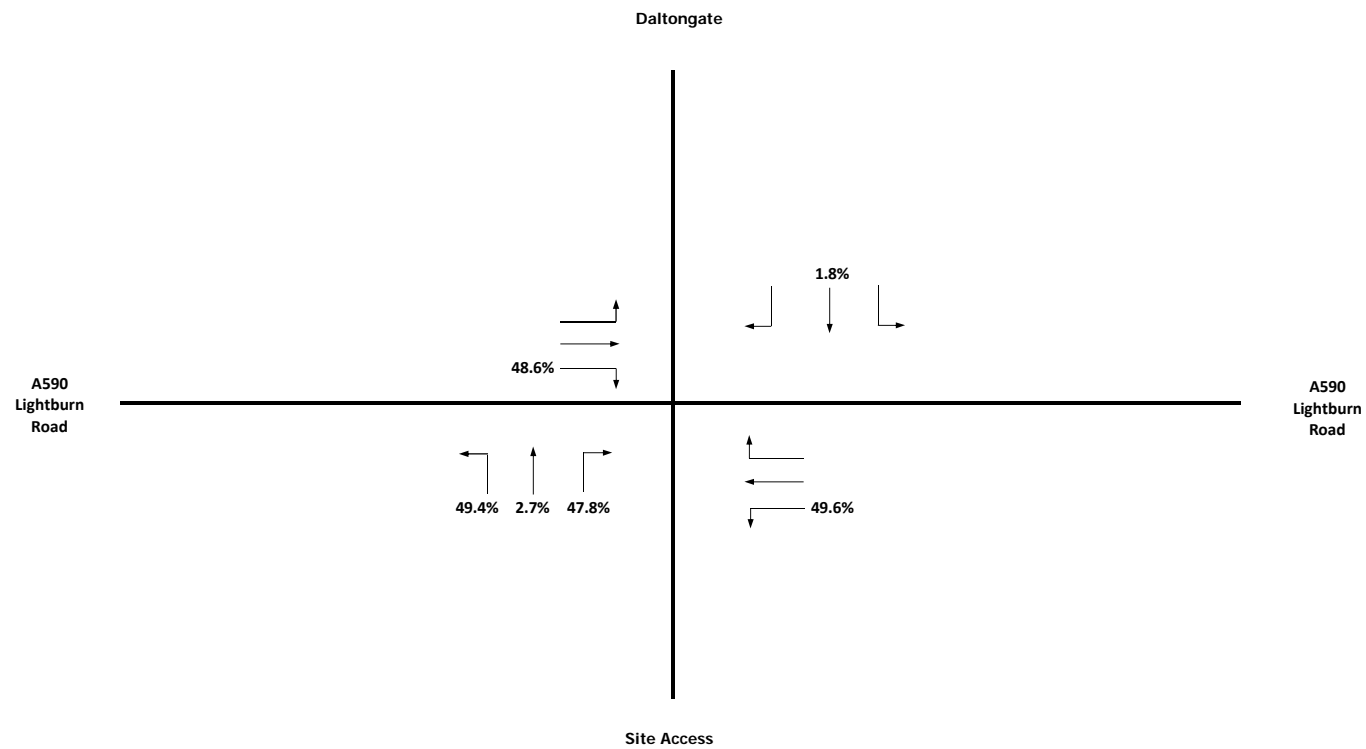


Figure 6 Sainsbury's Foodstore Trip Distribution
Saturday peak hour (1130 - 1230)

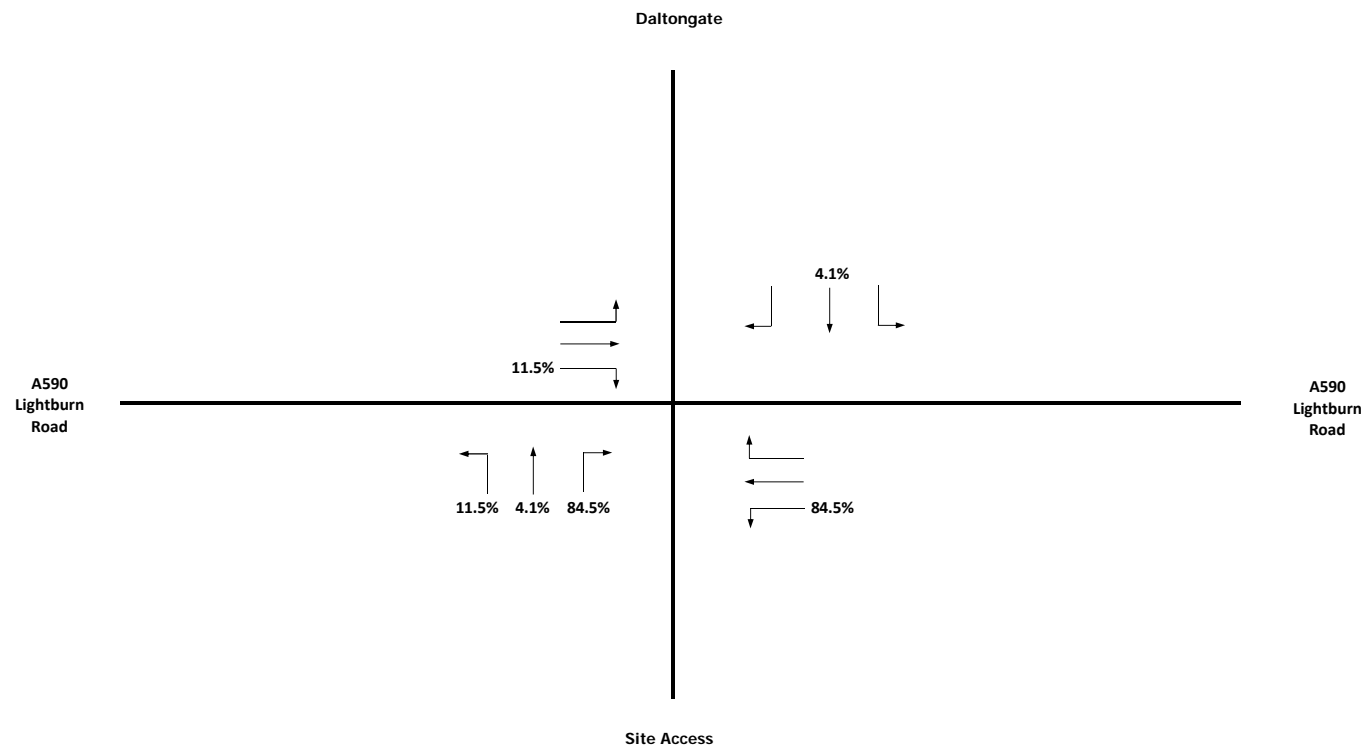


Figure 7 Employment Trip Distribution
Weekday PM peak hour (1600 - 1700)

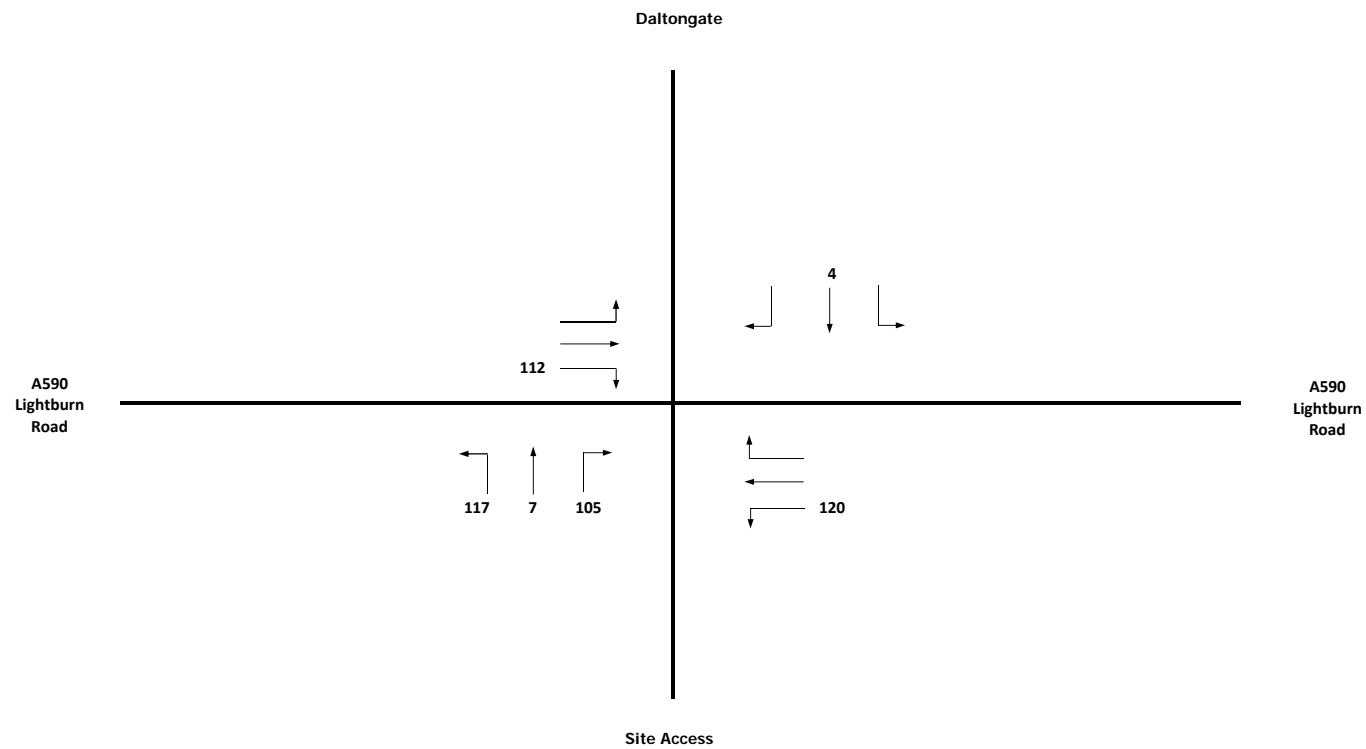


Figure 8 Sainsbury's Foodstore Trips
Weekday PM peak hour (1600 - 1700)

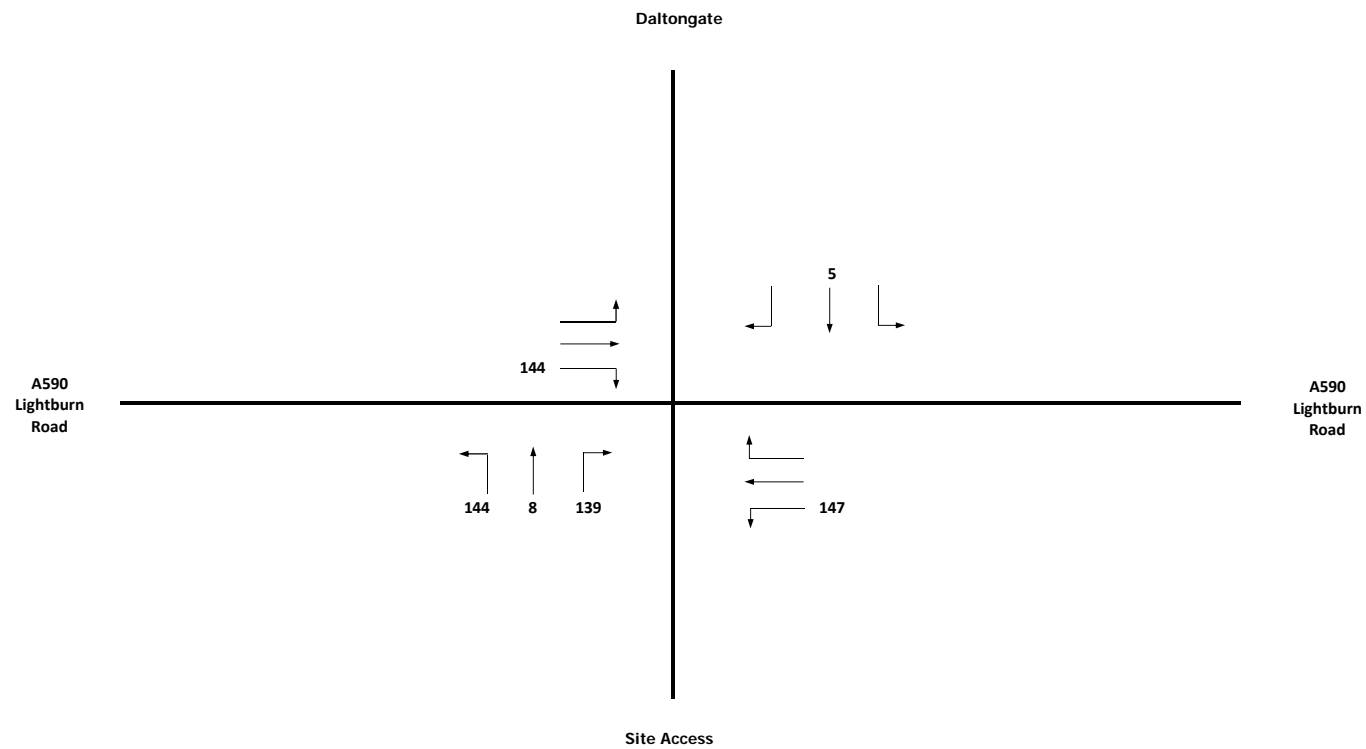


Figure 9 Sainsbury's Foodstore Trips
Saturday peak hour (1130 - 1230)

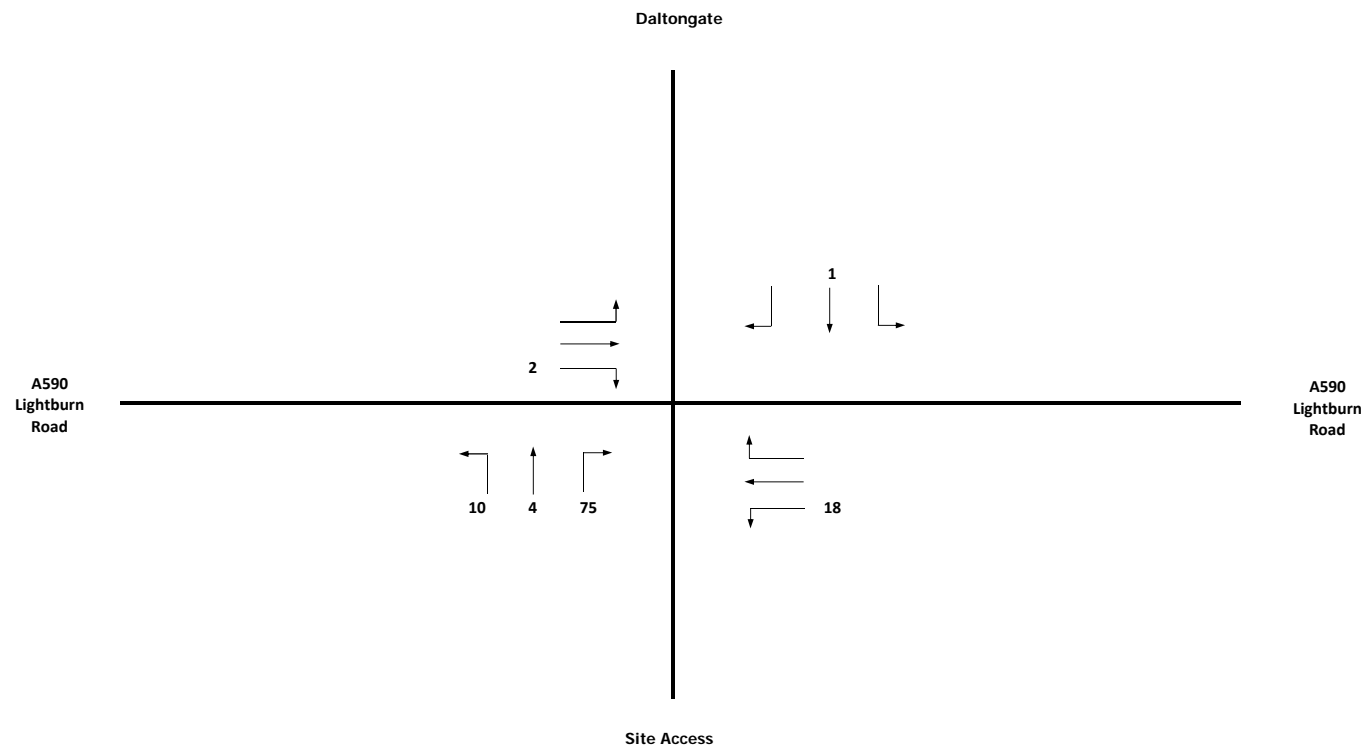


Figure 10 Employment Trips
Weekday PM peak hour (1600 - 1700)

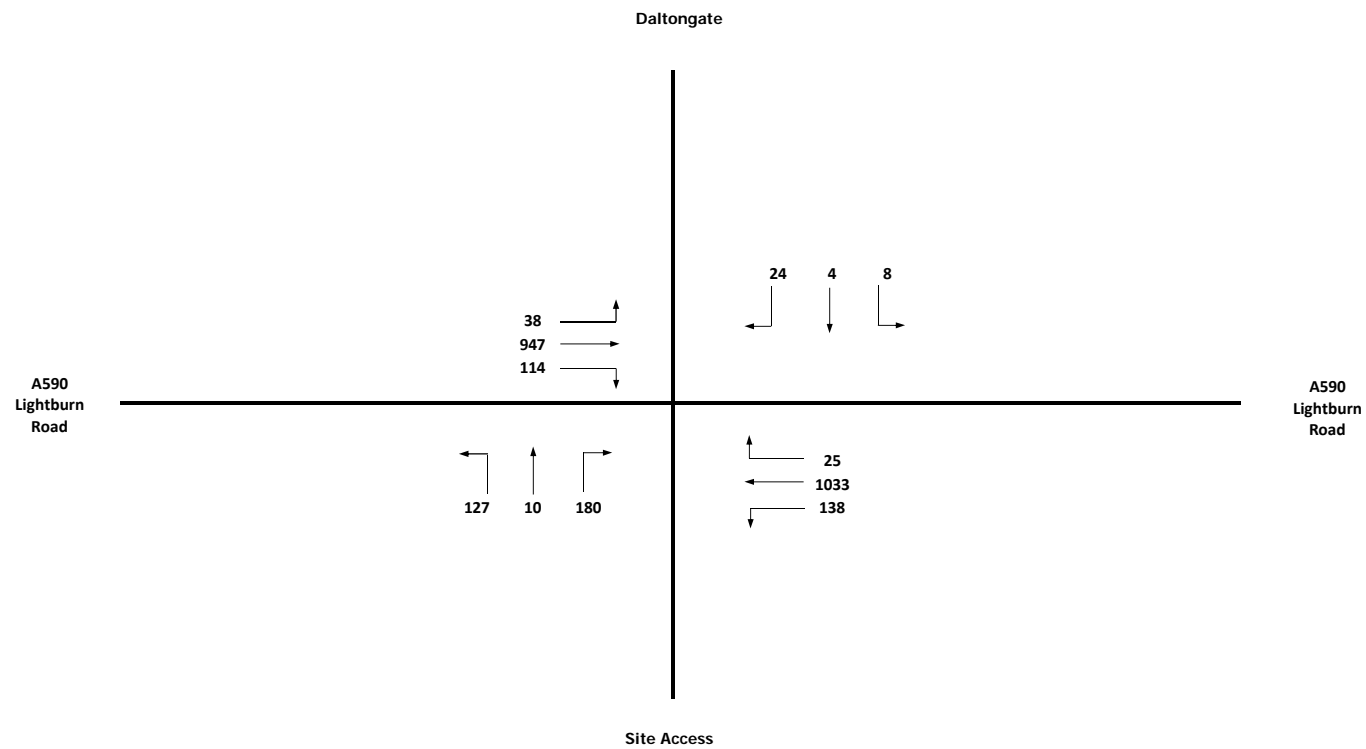


Figure 11 2022 Baseline With Development Trips
Weekday PM peak hour (1600 - 1700)

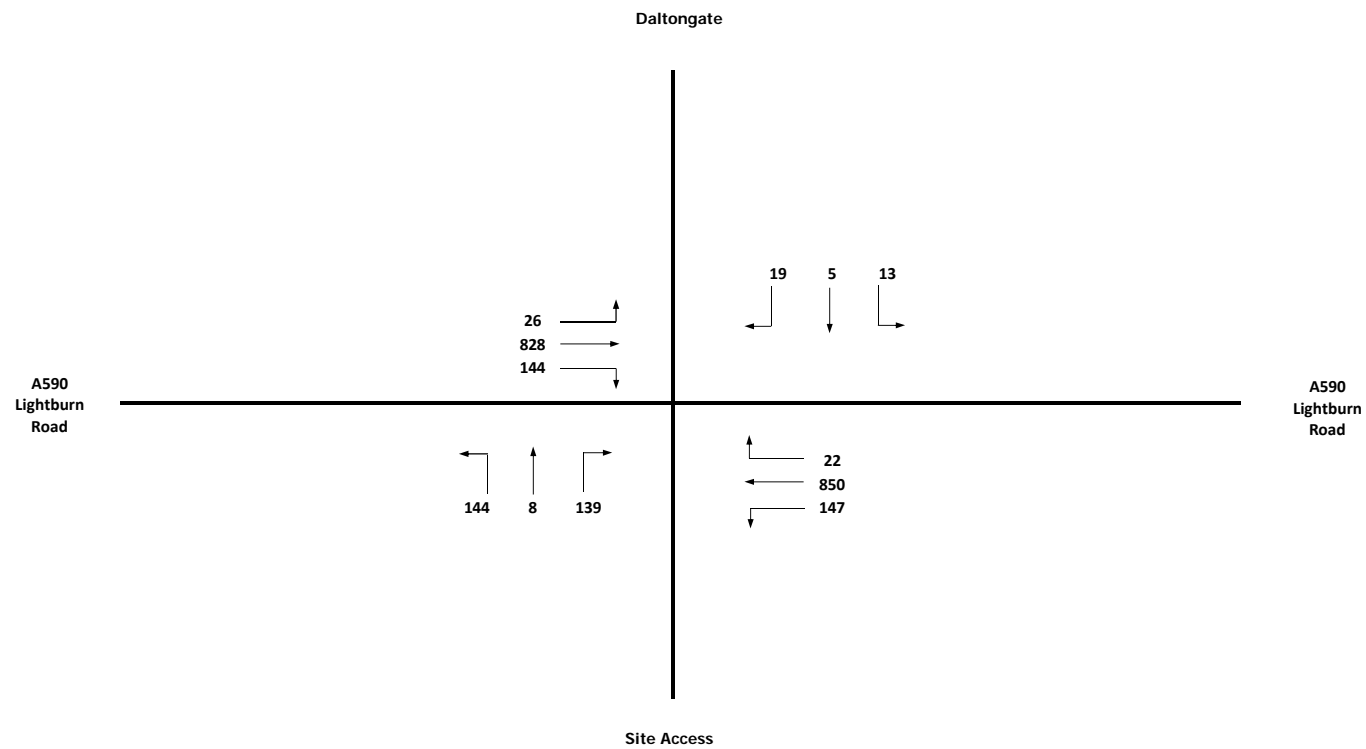


Figure 12 2022 Baseline With Development Trips
Saturday peak hour (1130 - 1230)

Appendix 2

Heritage Report

TURLEYASSOCIATES



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Appendices:

Appendix 1 – Historic Maps

Appendix 2 – Ulverston Conservation Area

Appendix 3 – Hill Top List Entry Description

Appendix 4 – Dykelands List Entry Description

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1. Introduction

- 1.1 This Heritage Assessment has been prepared by Turley Associates heritage team on behalf of Sainsbury's Supermarkets Limited to inform representations to the South Lakeland Site Allocations Development Plan Document in connection with land to the south of Lightburn Road, Ulverston.
- 1.2 There are no designated heritage assets within the site, the purpose of the assessment is therefore to identify and gain a greater understanding of the significance of the heritage assets proximate to the site, and to consider the potential impact of future development on their settings.
- 1.3 *The National Planning Framework (NPPF)* (March 2012) contains the Government's national planning policies on the conservation of the historic environment. Paragraph 126 requires that:

*'Local planning authorities should set out in their Local Plan a positive strategy for the conservation and enjoyment of the historic environment . . . In doing so, they should recognise that heritage assets are an irreplaceable resource and conserve them in a manner appropriate to their significance.'*¹

¹ The National Planning Policy Framework (*NPPF*), (March 2012), Communities and Local Government.

2. Overview of the History and Development of the Site

- 2.1 The site is predominantly open agricultural land, located to the south west of Ulverston Town Centre. A single storey house referred to as 'West Lodge', together with an associated barn and areas of hardstanding is included within the site and to the north, fronting Lightburn Road is a row of terraced cottages. The site is bounded to the south by the Furness railway line and by Lightburn Road to the north. Hill Top House is located to the east.
- 2.2 Lightburn Road is part of the A590, which is the main east-west route through Ulverston and the Furness Region. Historically this road was of strategic importance to the town as the main connecting route with the market town of Dalton to the south west. During the early medieval period Dalton was the more important trading town in Furness, due to its proximity to the monastery of Furness Abbey. It was likely therefore that this road carried a steady flow of medieval traffic as travellers took advantage of this steady route along the Leven Valley to the market place of Dalton.
- 2.3 There is no evidence to suggest that the site to the south of Lightburn Road was used for anything other than agricultural purposes during this period, with the town's earliest medieval buildings clustered around the parish church of St Mary in the north east of modern Ulverston.
- 2.4 Following the dissolution of Furness Abbey in 1537 activity along Lightburn Road would have greatly reduced as Dalton's importance as a trading centre diminished. During this period the town expanded eastwards as Ulverston's main trading routes were oriented towards crossing points across the Morecombe sands. Development in this area intensified as Ulverston grew in prosperity and renown.
- 2.5 The construction of Ulverston Canal Head in 1795 brought increasing wealth to the town, and this prompted further development to the south west. This came in the form of impressive country villas for the town's mercantile classes who took advantage of the area's picturesque setting along the river valley.
- 2.6 Although the application site remained as open countryside, the first edition OS map of 1850 shows a number of such estates in close proximity to the site. Most notably, Hill Top House was constructed immediately to the east of the site, at the edge of the town and at the brow of a hill overlooking the wider area. Dykelands cottage is close to the application site and Stone Cross Mansion and Fair View are located to the north.

- 2.7 The 1850 OS Map also shows the Furness railway line, built in 1841. Cut into the landscape along the southern edge of the site, the railway line was a significant intervention in the area and this defines the boundary of the site to the south. There is evidence that a series of trees were subsequently planted to screen the wider landscape from the incursion created by the railway line.
- 2.8 The 1895 OS Map shows the catalytic effect of the railway line on the landscape. A series of terraced houses were built along Lightburn Road. It is likely that these were workers cottages intended for the maintenance of the railway, and this map also shows a footpath link from these properties to the railway line. There is also evidence of intensified planting along Lightburn Road to obscure the railway line from view.
- 2.9 The 1931 OS Map shows some small changes to the application site. The row of terraced cottages is identified as 'Pennington Lane End' and a small outbuilding and a public house known as the 'Beehive Inn' have been built to the rear. The map shows that a small lodge that has been constructed to the east of the terraces, fronting Lightburn Road. This, together with a separate outbuilding is set within a triangular plot of land.
- 2.10 This map is also distinctive for showing the significant expansion of Ulverston around the railway station to the south. The encroachment of new development has restricted the previously open character of the countryside.
- 2.11 The 1956 OS map reveals little change in comparison to a slightly later OS map of 1973. This map identifies the lodge building as 'West Lodge' and shows a noticeable change in the land surrounding it. This map also shows increasing development to the south of the railway line, with the visible enclosure of the application site behind increasing levels of development along Woodland Road.
- 2.12 Since 1973, Lightburn Road has developed into a dual carriageway carrying a steady flow of traffic into Ulverston Town centre. The land associated with West Lodge has increased in coverage and a large barn has been added. West Lodge itself has been altered and enlarged.
- 2.13 Copies of the relevant historic maps are included at Appendix 1.

3. The Heritage Assets

- 3.1 The NPPF² defines heritage assets as those parts of the historic environment that have significance because of their historic, archaeological, architectural or artistic interest as heritage assets. These are noted to comprise:

“A building, monument, site, place or area of landscape identified as having a degree of significance meriting consideration in planning decisions, because of its heritage interest”³.

- 3.2 The definition includes designated heritage assets (A World Heritage Site, Scheduled Monument, Listed Building, Protected Wreck Site, Registered Park and Garden, Registered Battlefield or Conservation Area designated under relevant legislation) and assets identified by the local planning authority (including local listing).

Designated Heritage Assets (Indirect – Setting)

Ulverston Conservation Area

- 3.3 Ulverston Conservation Area was first designated in 1971 in order to preserve the historic core of the town. The Conservation Area has subsequently been extended, with a final boundary revision taking place on 24th May 2006.
- 3.4 The Conservation Area is centred on Ulverston Town Centre. The boundary extends northwards to include terraced housing around Soutergate and Sun Street. It extends to the west to include Stone Cross House (school) and the land associated with it. Ulverston Railway Station is included within the southern boundary of the conservation area, together with terraced housing along Conishead Road, adjacent to the Furness Railway line. To the east, the boundary includes Ford Park.
- 3.5 A map of the boundary of the conservation area is included at Appendix 2.

² NPPF, (March 2012), Communities and Local Government.

³ NPPF, Annex 2: Glossary

Hill Top (Grade II Listed Building)

- 3.6 Hill Top is included in the statutory list of special architectural or historic interest at grade II. It was first added to the list on 20th June 1972. The full List Entry Description is included at Appendix 3.
- 3.7 The list description states the following:

"House. Early to mid C19, altered. Roughcast with concrete tile roof. 2 storeys. Originally a symmetrical 3-bay facade extended to left by 2 narrow bays. Windows are glazing-bar sashes on the ground floor and C20 casements with glazing bars on the 1st floor, all in painted plain stone surrounds with projecting sills. The doorway, in the 4th bay, has a porch of baseless Tuscan columns with pilaster responds, a cornice, and blocking course. Chimneys on gables and to right of 2nd bay. INTERIOR: not inspected."

Dyklands (Grade II Listed Building)

- 3.8 Dyklands is included in the statutory list of special architectural or historic interest at grade II. It was first added to the list on 19th April 1996. The full List Entry Description is included at Appendix 4.
- 3.9 The list description states the following:

"House. Probably 1834 by George Webster. Roughcast with limestone dressings and slate roof. Built in a cottage ornee style with Gothick detailing. 2 storeys and 4 bays. Facade has overhanging eaves carried on timber brackets with pendant bosses, and gables with pierced and carved barge-boards. The windows are timber casements with leaded glazing, pointed heads to the lights, and transoms to those on the ground floor. The 1st and 2nd bays have square bay windows of 3 lights, the left-hand one with a hipped slate roof with a pierced timber valance with pendants, and the right-hand one with a cornice with brattishing. The left-hand window on the 1st floor has an opening with trefoiled head below a gable. Above the 3rd bay there is also a gable and the 1st-floor window is of 3 stepped lights. The open gabled timber porch, also in the 3rd bay, is carried on 4 columns forming a screen of a central Tudor arch flanked by pointed arches. The barge-boards are plain. The chimneys, on the gables and between the 1st and 2nd bays, have caps with clustered octagonal shafts. INTERIOR: the ground floor has panelled window reveals,

doors of raised and fielded panels, and a staircase which has a closed string, slim turned balusters, and an octagonal newel. Above a doorway under the stairs, leading to the rear wing, is a glazed Gothic screen. The fireplace surrounds were renewed in the mid C20.”

4. Heritage Planning Policy Considerations

- 4.1 The following section provides an overview of relevant national planning policy considerations.

National Planning Policy Framework

- 4.2 The National Planning Policy Framework was introduced in March 2012 as the full statement of Government planning policies covering all aspects of the planning process. Chapter 12 (pg.30) provides the Government's policies regarding conserving and enhancing the historic environment.
- 4.3 Paragraph 126 outlines an obligation for Local Planning Authorities to set out a positive strategy in their Local Plan for the conservation and enjoyment of the historic environment. It states that in doing so, they should recognise that heritage assets are an irreplaceable resource and conserve them in a manner appropriate to their significance.
- 4.4 Paragraph 126 goes on to outline that, in developing this strategy, local planning authorities should take into account;
- *The desirability of sustaining and enhancing the significance of heritage assets and putting them to viable uses consistent with their conservation;*
 - *The wider social, cultural, economic and environmental benefits that conservation of the historic environment can bring;*
 - *The desirability of new development making a positive contribution to local character and distinctiveness; and*
 - *Opportunities to draw on the contribution made by the historic environment to the character of a place.*

PPS 5 Planning for the Historic Environment: Historic Environment Practice Guide (2010)

- 4.5 The NPPF supersedes *Planning Policy Statement 5 (PPS5) (2010)*. The guidance offered in the accompanying practice guide, *PPS5 Planning for the Historic Environment*, is still however a relevant consideration as part of planning decisions.
- 4.6 Section 4 of this document elaborates on the plan-making policies in PPS5, and offers advice with regard to plan-making at the Local Level. It outlines that when drawing up development plan documents, the key considerations will be;

1. *Whether the quality and comprehensiveness of the available evidence base is sufficient for devising a positive and proactive strategy for the historic environment in the area.*
2. *Setting out a description of the general character of an area or place, why it is important and how heritage assets create or contribute to this.*
3. *Developing a clear view of what needs to be achieved in relation to the historic environment in the area and considering how this can be achieved through the core strategy.*
4. *Whether specific area policies covering the conservation of particular heritage assets or categories of heritage asset are needed over and above those in national and regional policy in order to properly conserve and utilise heritage assets of the type found in the locality, given the threats and opportunities that exist there.*
5. *The possible need for Area Action Plans to address heritage-related planning issues in regeneration areas and/or supplementary planning documents to cover more detailed conservation issues such as extensions and alterations in conservation areas.*
6. *The extent to which threats fall outside of planning consideration.*

Relevant Guidance

The Setting of Heritage Assets: English Heritage (2011)

- 4.7 This recently published document sets out English Heritage guidance on managing change within the settings of heritage assets. It was originally intended to assist in the implementation of PPS5 and now fulfils the same role, within the context of the NPPF which defines setting as follows.
- 4.8 *“The surroundings in which a heritage asset is experienced. Its extent is not fixed and may change as the asset and its surroundings evolve. Elements of a setting may make a positive or negative contribution to the significance of an asset, may affect the ability to appreciate that significance or may be neutral.”*
- 4.28 In order to understand the contribution of a setting to the significance of a heritage asset, the document provides a checklist of attributes it may be appropriate to consider. It highlights, however, that only a limited selection of the attributes listed will be of particular relevance to an asset. These include the following;

- **The asset's physical surroundings** incorporating topography, the presence of other heritage assets, definition of the scale of the surrounding landscape features, land use and functional relationships, openness, enclosure and boundaries as well as history and degree of change over time.
- **Experience of the Asset** including key visual relationships as well as the quality of the surrounding environment.
- **An asset's associative relationships with other heritage assets.**

4.30 Throughout the document there is an emphasis on practical and proportionate decision-making and English Heritage confirms that protection of the setting of heritage assets need not prevent change. More than this, most places are within the setting of a heritage asset and are subject to some degree of change over time. The following is also stated:

"The design of a development affecting the setting of a heritage asset may play an important part in determining its impact. The contribution of setting to the historic significance of an asset can be sustained or enhanced if new buildings are carefully designed to respect their setting by virtue of their scale, proportion, height, massing, alignment and use of materials. This does not mean that new buildings have to copy their older neighbours in detail, but rather that they should together form a harmonious group."

5. Significance of the Heritage Assets

5.1 *The NPPF 2012* defines the significance of a heritage asset as:

“The value of a heritage asset to this and future generations because of its heritage interest. That interest may be archaeological, architectural, artistic or historic. Significance derives not only from a heritage asset’s physical presence, but also from its setting.”⁴

5.2 Generally, listed buildings hold special architectural or historic interest; scheduled monuments historic, architectural, artistic, traditional or archaeological interest; and, conservation areas are designated if they are of special architectural or historic interest, the character and appearance of which it is desirable to preserve or enhance. World Heritage Sites are places of Outstanding Universal Value.⁵ The principles of selection for both listed buildings and scheduled monuments are published by the DCMS⁶ and English Heritage has published guidance⁷ on the identification of four types of heritage value that an asset may hold: aesthetic, communal, historic and evidential value. Together, this guidance provides a framework for assessing the significance of heritage assets

5.3 As set out in Section 4, English Heritage has also published guidance⁸ in respect of the setting of heritage assets, which assists in assessing those elements of setting which may make a positive or negative contribution to the significance of a heritage asset.

5.4 The following assessments are therefore provided of the significance of the various heritage assets that may be affected by the application proposals, proportionate to the importance of the asset and sufficient to understand the potential impact of the proposals, given their nature and extent.

The Character and Appearance of Ulverston Conservation Area

5.5 The significance of Ulverston Conservation Area largely derives from the special architectural and historic interest of the historic core of the town.

⁴ *NPPF*, Annex 2: Glossary

⁵ 1972 UNESCO Convention Concerning the Protection of the World Cultural and Natural Heritage.

⁶ DCMS Principles of Selection for Listing Buildings (March 2010); DCMS Scheduled Monuments (March 2010).

⁷ English Heritage, Conservation Principles, Policies and Guidance (April 2008)

⁸ The setting of heritage assets: English Heritage guidance, Consultation draft (2010)

History and Development

- 5.6 While there are references to Ulverston Manor in the Domesday book and the town received a market charter from Edward I in 1280, the development of Ulverston was restricted by the dominance of Furness Abbey until the reformation of the monasteries in the 1537. Founded in 1127, the Abbey was central to activity in the Furness Region resulting in trade initially gravitating towards Dalton, which was in closer proximity to the Abbey.
- 5.7 After 1537, Ulverston's proximity to the (often hazardous) trade and communications routes across Morecombe Bay meant that the town superseded Dalton in importance and became the Furness region's main market town. With the exception of the early parish church of St Mary (1111) in the north east corner of the town, Ulverston's earliest notable pattern of development is clustered towards the original market place situated at the intersection between Daltongate and Market Street, at a high point in the north-west of the town.
- 5.8 It is still possible to discern the medieval street pattern in this area as buildings impose on all sides around the open market place and competed for space along Market Street and King Street as the town expanded eastward and northward.
- 5.9 As the only significant trading place in the area, Ulverston grew to prominence in the 17th and 18th century earning a reputation as the 'London' of the Furness. During this time Ulverston traded in goods including iron ore and slate and its weekly market would have filled the narrow streets. The town also began to produce cotton, paper, candles following the construction of mills along Gillbanks Beck. Consequently, Ulverston attracted numerous visitors who had travelled across the sands and were accommodated in several inns in the town centre.
- 5.10 The opening of the Ulverston canal head to the east of the town centre in 1796 marked the next most significant phase in the town's development. Designed by the engineer John Rennie, the canal facilitated transport to the Leven estuary and the large scale trade of goods. Indeed, Vessels carrying iron ore, gunpowder, bobbins, barrel hoops, cotton, roofing slates and leather could now sail down the waterway and into the open waters of the estuary. Not only was there scope for new industrial development, it also caused the population of the town to double in less than 50 years.
- 5.11 The resultant development included several phases of house building, with more majestic properties along Queen Street, as well as larger country residences, such as Stone House, on the outskirts of the Conservation Area. There are also a series of workers terraces towards Ulverston Canal Head to the East. A significant

rise in civic development took place, with Ulverston becoming home to leisure venues, civic institutions and banking halls.

- 5.12 This more prestigious phase of development is manifested in the construction of County Square, to the South West of Market Place. This set piece, dominated by County Hall and overlooked by baronial-style corner buildings characterises the Victorian wealth and tastes of the time. This is also evident across Market Place and new Market Street.
- 5.13 The construction of an impressive two-storey Italianate railway station at Ulverston along the Furness Railway line emphasised the status of Ulverston as a prominent location within the area. Ironically, this also signalled the end of the town's period of high prosperity as the arrival of the railway line meant that goods could be transported cheaply and more efficiently elsewhere.

Character and Appearance

- 5.14 The character and appearance of Ulverston Conservation Area derives from the still legible traditional medieval market centre, embellished with impressive Victorian buildings and streets. The conservation area also benefits from an impressive landscape setting in the Leven valley, below a range of hills to the north.
- 5.15 The fine medieval urban grain around Market Place creates a feeling of enclosure within Ulverston's narrow streets, enabling only slight glimpsed views across to the hill ranges to the north. This part of the Conservation Area is characterised by a dense arrangement of inns and passageways, together with some of the grander Victorian buildings inserted into the streetscape. These include the opulent front to the King's Arms, as well as George Webster's Trustee Savings Bank.
- 5.16 To the south of market place, the scale of development becomes larger and more uniform. A series of large townhouses, theatres and impressive shopfronts line Queen Street and Princess Street, a number of which are rendered and painted bright colours to reflect the cosmopolitan character of the town. This area also includes County Square which features the dominant Coronation Hall, which is also rendered and brightly painted.
- 5.17 This area, alongside the streets approaching Ulverston Canal Head, also contains a series of two-storey worker's terraces which feature the local painted vernacular. There is also widespread use of Ulverston's rusticated limestone across the conservation area.

- 5.18 The western part of Ulverston Conservation Area includes Stone Cross Mansion, a large house and grounds built in 1874 for Myles Kennedy, an important ironmaster. This impressive property is almost entirely enclosed within external boundary walls and woodland which formed Myles Kennedy's Estate. It is likely that the landscape within the stone walls would have been purposefully designed as private gardens and grounds to the house.

Setting

The Asset's Physical Surroundings

- 5.19 Ulverston Conservation Area forms part of the wider settlement of the town within a gently undulating landscape beneath a backdrop of hills to the north. The landscape to the south gently lowers down to the River Leven.

Experience of the Asset

- 5.20 The most prominent feature within the setting of the conservation area is the steep incline of Hoad Hill to the North East of the town, upon which sits the Barrow Monument. The Monument commemorates Sir John Barrow, geographer and secretary to the admiralty, and is a replica of Smeaton's Eddystone Lighthouse of 1759. The scale of Hoad Hill and the position of the monument give it landmark quality and this is a key feature in many important views across the conservation area. This and the several other hills to the north (including Flan Hill and Hasty Gill) provide a dramatic and attractive landscape backdrop to the town. The dominant scale of the landscape contrasts with the modest scale of the town and its urban character.
- 5.21 The landscape setting to the south west of Ulverston Conservation Area, including land to the south of Lightburn Road, is of lesser importance to the significance of the conservation area than that to the North. Much of this area is distanced and detached from the Conservation Area by the distinct boundary wall that encloses the grounds of Stone Cross House, or comprises land that descends further into the Leven valley behind the cutting of the Furness Railway Line. The most important views at this point are those looking into the Conservation Area as the grounds of Stone Cross Mansion rise to the North East.
- 5.22 The setting to the south and east of the Conservation Area is urban in character. The area to the east of the Conservation Area is dominated by Ulverston Canal Head, while residential development and schools prevail to the south.

The Asset's Associative Relationship with other Heritage Assets

- 5.23 As an important centre of trade from the medieval period onwards, the most important associative elements within Ulverston's setting are the relationship between the town and the trade routes that determined its origins and growth. The importance of Lightburn road as a busy thoroughfare into Ulverston is a reminder of the early trading relationship with Dalton and Furness Abbey and Furness Abbey and Dalton are of particular importance in understanding the historical development of the town.
- 5.24 Ulverston's historic trade routes to the east, particularly via Ulverston Canal Head and routes across Morecombe sands, are also of great importance. It was these routes through which the town enjoyed its greatest successes and most significant phases of development.

Summary of Significance

- Ulverston Conservation Area is focussed on the historic centre of Ulverston, which operated as the Furness region's most prosperous trading town since the dissolution of Furness Abbey.
- The special architectural and historic interest of the Conservation Area can be attributed to the compact nature of the town centre and the remaining tangible reference to its medieval form. This is characterised by the enclosure created by its streets and narrow passageways's and is embellished with grand civic and commercial buildings built following Ulverston's rise to prominence in the 17th and 18th centuries. The town has an attractive local vernacular of painted rendered housing which feature the use of local sandstone.
- The hill range to the north of the town is an element of its setting that contributes to the significance of Ulverston Conservation Area, in particular, the Barrow Monument on Hoad Hill to the North West. This dramatic backdrop contributes aesthetically and contrasts with the scale and urban character of the conservation area.

Hill Top (Grade II Listed Building)

Architectural Interest

- 5.25 Hill Top Cottage is significant as the once prominent residence of a wealthy Ulverston resident.
- 5.26 The position of the house within its own grounds at the crest of a hill along one of the main routes leading out of Ulverston implies that the house was intended as an imposing country retreat designed to stand apart from the surrounding countryside.
- 5.27 The building would have originally appeared as an elegantly proportioned Georgian house with a pitched roof and three bay facade with sash windows and a central arched window.
- 5.28 Tellingly, the house's concrete-tiled roof and roughcast cladding suggest that the house was constructed of cheap materials such as rubble stone or poor quality brick and decorated to give the appearance of fine ashlar. This suggests that the house may have been built by a self-made man eager to make his impression as a wealthy Ulverston resident.
- 5.29 At some point, the house was extended by an extra two bays on the south side and a single storey extension was added on the north side. A small one storey coaching house with a hipped roof was also added to the estate. These extensions give evidence of the owner's increased prosperity and status as the house was adapted to provide more reception space for visitors and entertaining.

Historic Interest

- 5.30 Hill Top is of historic interest as a tangible manifestation of the wealth and prosperity that ensued in Ulverston following construction of the Ulverston Canal in 1795 as Ulverston's rich mercantile residents sought country retreats around the fashionable and prosperous town centre.
- 5.31 Although already a successful market town, Ulverston's population doubled following John Rennie's construction of the Ulverston canal to the town centre in 1795. The construction of Hill Top and subsequent extensions were therefore during the peak of the town's prosperity, and it is likely that it belonged to a wealthy Ulverston resident who intended to utilise the house as an impressive venue for entertaining.

Setting

The asset's physical surroundings

- 5.32 The house is set within its own private grounds, including a driveway and private lane, a gated and enclosed designed garden to the east and south, enclosed by planting and a stone wall and a large area of paved hardstanding to the west, beyond which is a small field, enclosed by fencing and trees. The house and wider site occupy an elevated position above Lightburn Road and is separated from the road by two rows of stone boundary walls, together with banks of trees and shrubbery.

Experience of the asset

- 5.33 The house sits higher than the surrounding development and stands as a dominant feature over the landscape to the East and West. Indeed, the gables and chimney stacks of the cottage are visible along the length of the southern part of Lightburn Road.
- 5.34 Consistent with middle class residential villas of the period, including the several scattered around Ulverston, the building was intended to have a close relationship with its immediate grounds. Indeed, such villas were primarily intended as rural retreats from urban life, although always set within easy reach of town. Rather than operating as larger estates that had a working relationship with the landscape, these villas required only small grounds of which the most important aspect was their ornamental and picturesque qualities.
- 5.35 Accordingly an atmosphere of privacy and seclusion has historically characterised the villa's setting. An 1850 OS map shows how the cottage and surrounding grounds were contained within a tight boundary set within a landscape of larger fields. It is clear that the land ownership of the estate included small partitioned areas to the south and east of the main house, which included trees and ancillary buildings, and it is likely that the land ownership extended to include the small field to the west of the house. Indeed, the sweep of this field down to the west would have allowed the house views over the landscape.
- 5.36 A later OS map dating to 1895 provides more detail regarding the features of the landscaping scheme surrounding the house. From this map it is possible to discern the intention to screen the property from surrounding development and create a sense of privacy from the open landscape to the west. The eastern and southern edges of the grounds, bounding the railway cutting into Ulverston station,

were heavily planted with a bank of trees which entirely divorces the property from this area. Importantly, the map also shows the planting of rows of trees to the west of the property interrupting views across the wider landscape and also separating the property from the small field to the west. Subsequent maps show little change in the arrangement of the grounds apart from the addition of some curtilage buildings within the immediate setting of the cottage.

- 5.37 Currently the estate's grounds still retain the heavy banks of trees to the east and south as well as the row of trees to the rest of the property. Despite the imposing nature of the house, the character of the immediate grounds were purposefully private and secluded and they still retain this character of seclusion. The house is enclosed and inward-facing, with the principal facade orientated toward its gated gardens to the east.

The asset's associative attributes

- 5.38 The setting of Hill Top has some association with the wider landscape of country estates in the area, including Dykelands and Stone Cross House. All of these properties can be characterised as the homes of Ulverston's wealthy merchant classes positioned shortly out of the town centre to ensure seclusion and privacy.

Summary of Significance

- Hill Top is significant as the residence of a wealthy Ulverston resident. It is an elegantly proportioned building placed at the crest of a hill along Lightburn Road and was subject to extensions and embellishments that also contribute to its significance.
- As its name would suggest, Hill Top was intended to have some degree of aspect over the landscape to the west. The house is however intimately related to its well defined setting and is enclosed within private grounds.

Dykelands (Grade II Listed Building)

Architectural Interest

- 5.39 Dykelands was built as a fashionable middle class villa situated within its own secluded grounds to the South West of Ulverston.

- 5.40 Built in 1834, during the height of Ulverston's prosperity, it is distinctive as an elaborate villa in the fashionable Cottage Ornee style. Indeed, extremely popular during the early nineteenth century, the Cottage Ornee style drew together elements of traditional rustic cottage style from different regions and periods and pieced them together, creating a hybrid design. Accordingly, the building is quaint and domestic in character, incorporating eclectic gothic flourishes.
- 5.41 The fashionable nature of the Gothic Revival architectural style in Ulverston at the time can be observed through other residential buildings in the area, such as Stone Cross House, as well as several civic buildings across the town centre. It is likely that this choice of style reflected Ulverston's stature as an important market town during the Medieval Period.
- 5.42 The building itself is a two storey cottage with a gabled roof featuring heavy chimney stacks and an eclectic four bay facade facing north and a two bay extension to the south of the property. The eclectic facade composition incorporates bay windows in the first and second bays, each individually decorated with elaborate corning above the second window and a hipped gabled roof above the first. It also features a distinctive window with a trefoiled head in the fourth bay, as well as a gabled timber porch in the first bay.
- 5.43 The List Entry Description also makes reference to features of the interior that contribute to the overall architectural interest of the building.

Historic Interest

- 5.44 The historic interest of Dykelands can also be linked to the wealth and prosperity of Ulverston following construction of the Ulverston Canal.
- 5.45 Not only was the choice of building style and design fashionable, but it is likely that Dykelands can be attributed to George Webster. One of Cumbria's most notable architects, Webster was active in Cumbria during the early 19th century and was responsible for a number of important civic, commercial and residential works, such as banks in Ulverston and Kendal, as well as Settle Town Hall. This heightens the historic significance of the building

Setting

The Asset's Physical Surroundings

- 5.46 The setting of Dykeland's is firmly defined by the way in which the property is enclosed and secreted within its grounds. The property is separated from Lightburn Road on the north west side by a stone boundary wall and a heavy arrangement of planting obscures the cottage from view. Indeed, it is just possible to see the tips of the gables over the dense arrangement of planting. Views into and out of the property to the north are similarly restricted with dense screening separating the property from the neighbouring major intervention of the railway line and landscape beyond.

Experience of the Asset

- 5.47 The 1850 OS map shows how the house and surrounding grounds were contained within a tight boundary set within a landscape of larger fields. It is likely that the ownership of the land was restricted to the plot of land immediately surrounding the property as well as a small field to the south west of the property. Even at this stage it is possible to observe the enclosed character of the estate surrounded by trees on all sides, with a particularly thick bank between the property and railway line to the north.
- 5.48 A subsequent OS map from 1895 shows the development of a small outbuilding enclosed within a boundary wall to the south of the Dykelands. This additional cottage is similarly enclosed behind trees and withdrawn from Lightburn road. The presence of this building may also indicate the expansion of the Dykelands estate to include a field to the south, also screened by trees.
- 5.49 While later maps from 1931 and 1956 show the evolution of the wider Dykelands estate including the partition of the southern fields and further tree planting, the immediate setting around the cottage can be seen to retain its secluded character behind heavy banks of trees.

The asset's associative attributes

- 5.50 As with Hill Top, the setting of Dykelands has an association with the wider landscape of country estates developed outside Ulverston Town Centre.

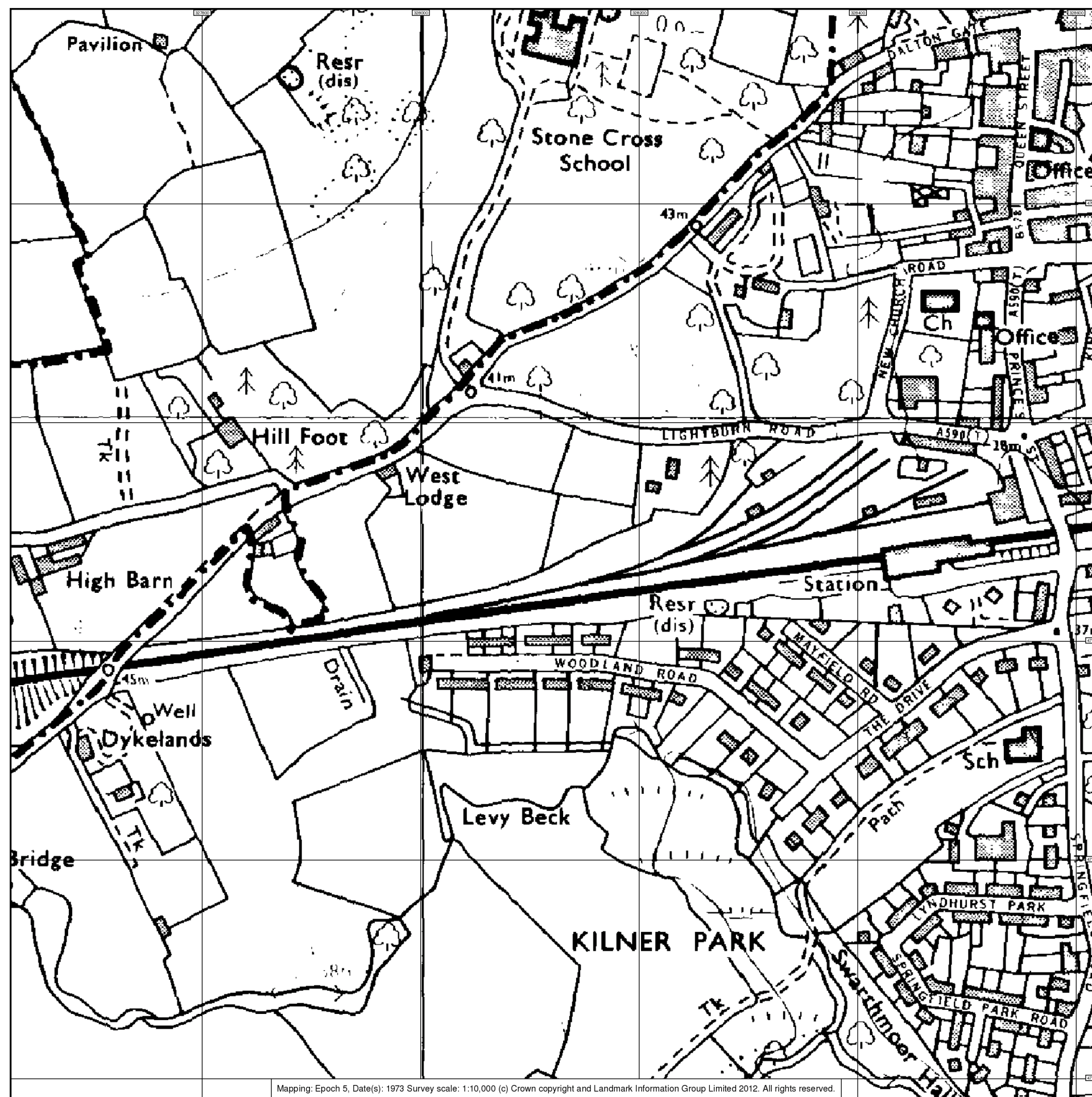
Summary of Significance

- Dykelands is significant as a fashionable middle class villa situated within its own secluded grounds.
- It is designed in one of the most fashionable styles of the period and is likely to have been a commission for the famous Cumbrian architect, George Webster.
- Its eclectic gothic style reflects other properties in the Ulverston area, most notably Stone Cross House, and the property is similarly likely to have belonged to an important Ulverston resident.
- The setting of the property is characteristically private and secluded.

6. Conclusions

- The site to the south of Lightburn Road comprises no designated or non-designated heritage assets. Traditionally open agricultural land, the site is outside the boundary of Ulverston Conservation Area and is distanced from the sensitive historic core of the town.
- The most significant elements of the landscape setting of Ulverston Conservation Area include the hill range to the north of the town centre and, in particular, the Barrow Monument on Hoad Hill to the north west. The site, to the south of Lightburn Road, occupies an area of landscape that has a limited visual or historic relationship with the conservation area.
- Hill Top is a grade II listed building and of significance as the residence of a wealthy Ulverston resident. It is an elegantly proportioned building placed at the crest of a hill along Lightburn Road and was subject to extensions and embellishments that also contribute to its significance. Whilst Hill Top was intended to overlook the landscape to the west to some degree, the house is particularly related to its intimate and well defined immediate setting comprises of enclosed private grounds with the main facade of the house orientated towards and overlooking the designed garden to the east. There is no evidence of a historic or functional relationship with land to the west. It is separated from the site by fencing and planting that creates enclosure and limits interaction between the two areas.
- Dykelands is significant as a fashionable middle class villa situated within its own secluded grounds. It is designed in one of the most fashionable styles of the period and is likely to have been a commission for the famous Cumbrian architect, George Webster. Dykelands is located further from the site than Hill Top and is separated from the site by the Furness railway line. As with Hill Top, the setting of Dykelands is well defined and characterised by the enclosed and insular nature of its grounds, surrounded by trees, designed to allow only glimpse views of the dwelling. The setting of the property is characteristically private and secluded and the site to the south of Lightburn Road does not make a positive contribution to the significance of the asset, either historically or visually.

Appendix 1 - Historic Maps



Landmark Historical Map
Mapping: Epoch 5
Published Date(s): 1973
Originally plotted at: 1:10,000



Mapping: Epoch 5, Date(s): 1956 Survey scale: 1:10,560 (c) Crown copyright and Landmark Information Group Limited 2012. All rights reserved.



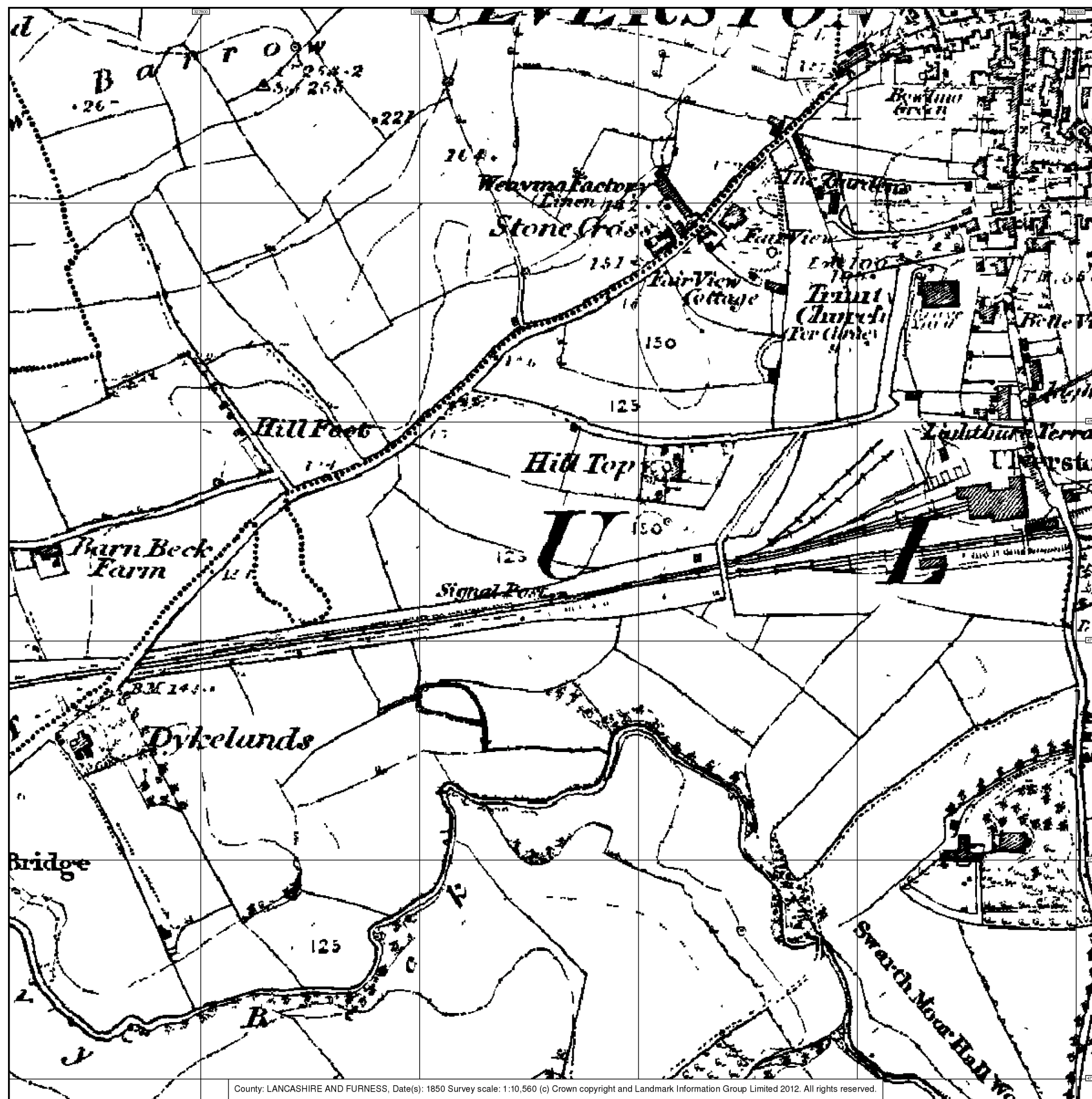
Landmark Historical Map
Mapping: Epoch 5
Published Date(s): 1956
Originally plotted at: 1:10,560



County: LANCASHIRE AND FURNESS, Date(s): 1931 Survey scale: 1:10,560 (c) Crown copyright and Landmark Information Group Limited 2012. All rights reserved.



Landmark Historical Map
County: LANCASHIRE AND
FURNESS
Published Date(s): 1931

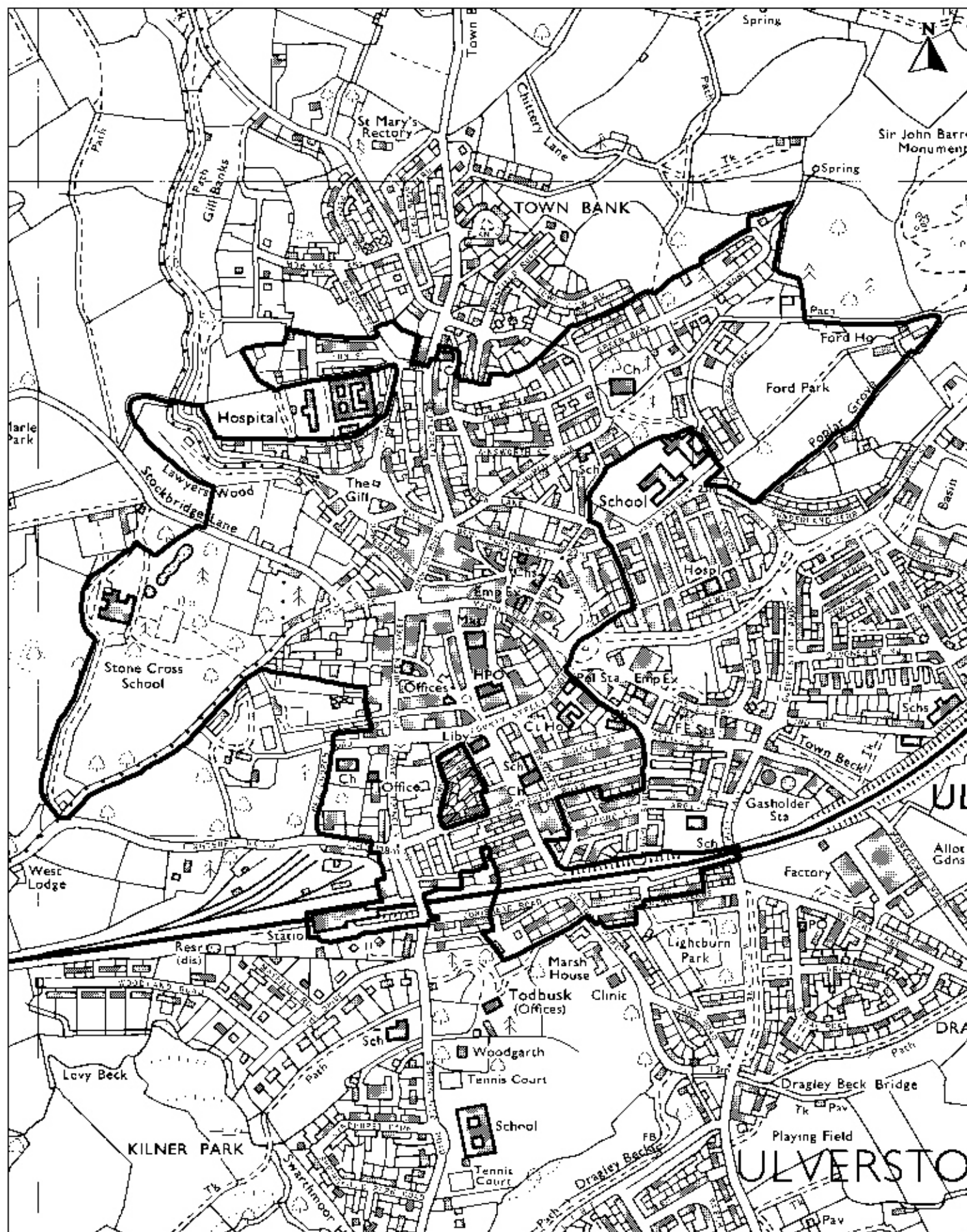


County: LANCASHIRE AND FURNESS, Date(s): 1850 Survey scale: 1:10,560 (c) Crown copyright and Landmark Information Group Limited 2012. All rights reserved.



Landmark Historical Map
County: LANCASHIRE AND
FURNESS
Published Date(s): 1850


Appendix 2 – Ulverston Conservation Area



Ulverston Conservation Area

- following Conservation Area Review as approved
24th May 2006

Scale - 1:7500

-  - Conservation Area Boundary
-  - Area excluded from Conservation Area

Appendix 3 Hill Top List Entry Description

List Entry Summary

This building is listed under the Planning (Listed Buildings and Conservation Areas) Act 1990 as amended for its special architectural or historic interest.

Name: HILL TOP

List Entry Number: 1270249

Location

HILL TOP, LIGHTBURN ROAD

The building may lie within the boundary of more than one authority.

County: Cumbria

District: South Lakeland

District Type: District Authority

Parish: Ulverston

National Park: Not applicable to this List entry.

Grade: II

Date first listed: 20-Jun-1972

Date of most recent amendment: Not applicable to this List entry.

Legacy System Information

The contents of this record have been generated from a legacy data system.

Legacy System: LBS

UID: 459939

Asset Groupings

This List entry does not comprise part of an Asset Grouping. Asset Groupings are not part of the official record but are added later for information.

List Entry Description

Summary of Building

Legacy Record - This information may be included in the List Entry Details.

Reasons for Designation

Legacy Record - This information may be included in the List Entry Details.

History

Legacy Record - This information may be included in the List Entry Details.

Details

ULVERSTON

SD27NE LIGHTBURN ROAD
626-1/1/54 (South side (off))
20/06/72 Hill Top

II

House. Early to mid C19, altered. Roughcast with concrete tile roof. 2 storeys. Originally a symmetrical 3-bay facade extended to left by 2 narrow bays. Windows are glazing-bar sashes on the ground floor and C20 casements with glazing bars on the 1st floor, all in painted plain stone surrounds with projecting sills. The doorway, in the 4th bay, has a porch of baseless Tuscan columns with pilaster responds, a cornice, and blocking course. Chimneys on gables and to right of 2nd bay. INTERIOR: not inspected.

Listing NGR: SD2822777947

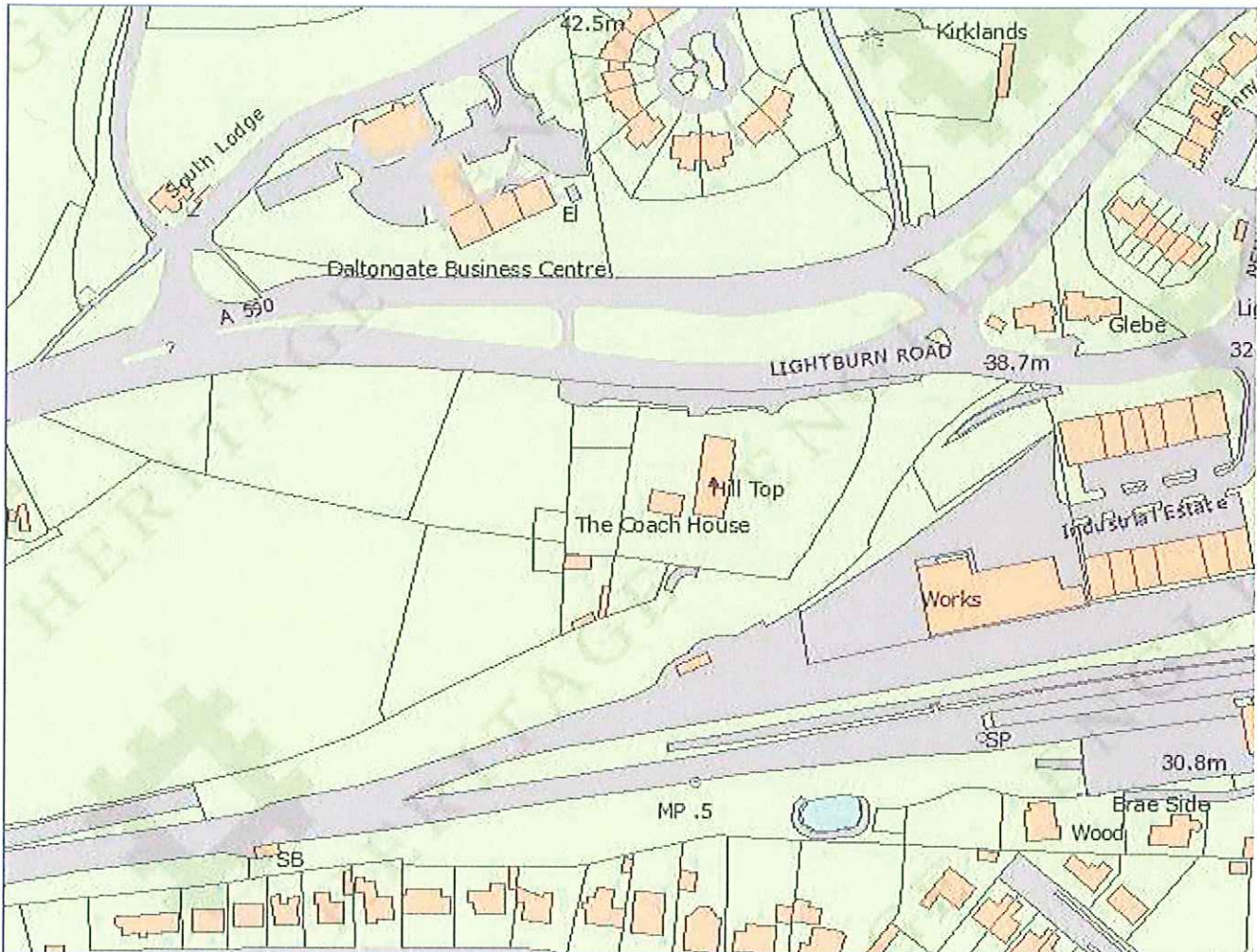
Selected Sources

Legacy Record - This information may be included in the List Entry Details.

Map

National Grid Reference: SD 28227 77947

The below map is for quick reference purposes only and may not be to scale. For a copy of the full scale map, please see the attached PDF - [1270249.pdf](#)



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Appendix 4 – Dykelands List Entry Description

List Entry Summary

This building is listed under the Planning (Listed Buildings and Conservation Areas) Act 1990 as amended for its special architectural or historic interest.

Name: DYKELANDS

List Entry Number: 1270248

Location

DYKELANDS, LIGHTBURN ROAD

The building may lie within the boundary of more than one authority.

County: Cumbria

District: South Lakeland

District Type: District Authority

Parish: Ulverston

National Park: Not applicable to this List entry.

Grade: II

Date first listed: 19-Apr-1996

Date of most recent amendment: Not applicable to this List entry.

Legacy System Information

The contents of this record have been generated from a legacy data system.

Legacy System: LBS

UID: 459938

Asset Groupings

This List entry does not comprise part of an Asset Grouping. Asset Groupings are not part of the official record but are added later for information.

List Entry Description

Summary of Building

Legacy Record - This information may be included in the List Entry Details.

Reasons for Designation

Legacy Record - This information may be included in the List Entry Details.

History

Legacy Record - This information may be included in the List Entry Details.

Details

ULVERSTON

SD27NE LIGHTBURN ROAD
626-1/1/53 (South side (off))
Dykelands

II

House. Probably 1834 by George Webster. Roughcast with limestone dressings and slate roof. Built in a cottage ornee style with Gothick detailing.

2 storeys and 4 bays. Facade has overhanging eaves carried on timber brackets with pendant bosses, and gables with pierced and carved barge-boards. The windows are timber casements with leaded glazing, pointed heads to the lights, and transoms to those on the ground floor. The 1st and 2nd bays have square bay windows of 3 lights, the left-hand one with a hipped slate roof with a pierced timber valance with pendants, and the right-hand one with a cornice with brattishing. The left-hand window on the 1st floor has an opening with trefoiled head below a gable. Above the 3rd bay there is also a gable and the 1st-floor window is of 3 stepped lights. The open gabled timber porch, also in the 3rd bay, is carried on 4 columns forming a screen of a central Tudor arch flanked by pointed arches. The barge-boards are plain. The chimneys, on the gables and between the 1st and 2nd bays, have caps with clustered octagonal shafts.

INTERIOR: the ground floor has panelled window reveals, doors of raised and fielded panels, and a staircase which has a

closed string, slim turned balusters, and an octagonal newel. Above a doorway under the stairs, leading to the rear wing, is a glazed Gothic screen. The fireplace surrounds were renewed in the mid C20.

Listing NGR: SD2768877697

Selected Sources

Legacy Record - This information may be included in the List Entry Details.

Map

National Grid Reference: SD 27688 77697

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number 102006.006.

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Appendix 3

Other Technical Considerations



Rawdon Property



HOW



Sainsbury's

3 Other Technical Considerations

Ground Conditions

1. Investigations have shown that the site has largely been in use as agricultural land according to historical records. Geological records show that site is underlain by Glaciofluvial Deposits, Devension Till and the Red Hill Limestone Formation. There are no recorded landfill sites within the site or in close proximity to it nor is the site within a coal mining affected area. A Desk Top analysis has concluded that given the relatively inert use of the site over time that it presents a very low risk of contamination and that ground conditions should not pose a technical constraint to development.

Flood Risk and Drainage

2. The site is located within flood zone 1 according to the Environmental Agency Mapping System which has the lowest probability of flooding. The nature of the development proposed can be classed as “less vulnerable” in line with guidance. Given the topography of the site and surrounding area the risk of flooding from overland flow is not considered to be significant however drainage design criteria for the site will have regard to making provision for the effects of climate change and consideration will be given to sustainable drainage systems.

3. Infiltration drainage systems will be considered as the preferred approach dependent upon the results of intrusive site investigations and soak away tests. If infiltration cannot be used then offsite flows will be implemented and restricted to the equivalent green field run off with a precautionary allowance for climate change. On site attenuation may be required however this is subject to further investigation. Discharge of foul water from the site will be to a sewer requisition from United Utilities. In summary there are no flood risk or drainage constraints to development.

Ecology

4. An ecological assessment of the site has been undertaken. This identifies that the site is predominantly made up of pasture fields and associated hedgerows. The site is not covered by any statutory or non-statutory designation and no records of protected species have been identified on the land. The site hosts four habitat types including grassland, hedgerows, buildings and amenity garden areas. The grassland was found to be semi improved pasture with relatively low species diversity and that the hedgerows were largely unmanaged with insufficient representation to categorise these as being of conservation interest under the hedgerow regulations.

5. With regard to protected species none of the trees on site were rated as providing bats with high or medium roosting potential whilst boundary trees were rated as having low to negligible potential. The existing buildings on the site have been surveyed and were rated as having a low potential for bats with no evidence of bat activity found.

6. It has been concluded that no potential for reptiles, amphibians or badgers occurs on the site and that the pasture fields are of low diversity and would have low value as foraging areas for bats and limited value for ground nesting birds. In conclusion the site has been assessed of low ecological value on the local scale and development would not have a significant impact on the biodiversity resource. In order to mitigate for the impacts of development, high quality landscape planting is recommended to strengthen retained habitat features and to develop new linear features where possible. There are not considered to be any ecological constraints to development of the site.

Air Quality

7. No Air Quality Management Areas have been cleared within Ulverston however air quality monitoring is undertaken by South Lakeland District Council locally. Historical information has been assessed which indicates that baseline conditions are well below the respective annual mean Air Quality Objectives for both nitrogen dioxide (NO₂) and particulate matter with an aerodynamic diameter of less than 10µm (pm₁₀). As a result existing baseline concentrations are not considered to represent a constraint to the development in air quality terms. Construction of the development would result in a small temporary increase in construction phase traffic and a local increase in associated vehicle exhaust emissions. Given the existing baseline concentrations it is highly unlikely that construction traffic would result in exceedences of any Air Quality Objectives. It is recognised that construction of the development would result in the generation of dust and that such effects would need to be mitigated through the application of control and mitigation measures to minimise potential impacts.

8. The development proposals include the commissioning of a biomass boiler to provide a renewable source of heat and power for the Sainsbury's store utilising a fuel source of wood pellets or woodchip. Given that technologies are included within the biomass boiler specification to minimise atmospheric emissions, it is not anticipated that this would give rise to substantial impacts on air quality. The proposals will give rise to additional vehicle trips travelling to and from the development. Subject to further detailed modelling of exhaust emissions associated with these additional trips, it is not anticipated that potential operational phase air quality impacts represent a constraint to the development of the site.



TURLEYASSOCIATES





**LAND AT WEST LODGE, LIGHTBURN ROAD
ULVERSTON
EMPLOYMENT LAND VIABILITY REVIEW**

12 APRIL 2012

**PREPARED BY
COLLIERS INTERNATIONAL**

**PREPARED FOR
RAWDON PROPERTY AND
SAINSBURY'S SUPERMARKETS
LIMITED**

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Appendix 6.4 – Masterplan B1 Development Appraisal – Plot 4

1. INTRODUCTION

Colliers International have been instructed by Sainsbury's Supermarkets Limited and Rawdon Property to provide an employment land appraisal for the Ulverston area that focuses on the potential viability of various development options that could bring forward employment land space on the subject site at Lightburn Road in Ulverston. The subject site is shown for identification purposes only hatched in blue on the plan attached at Appendix 1.

The subject site is located on the western edge of Ulverston and is approximately 400 metres from the edge of the town centre boundary. It is an undulating site with one dwelling currently located on the northern boundary and extends to approximately 7.2 acres. The site is neighboured on both the eastern and western sides by other undeveloped sites held in three separate ownerships, which extend to a combined area of approximately 4 acres. These are also shown hatched yellow, red and green on the plan attached at Appendix 1.

In our opinion, suitable uses for the subject site could include industrial, office and retail development. However, the site is specifically identified within the South Lakeland District Council Land Allocations DPD (Proposed Submission Version) published in March 2012, as a draft allocation for a Business/Science Park for B1 use.

This report briefly reviews the business space market in South Lakeland and Ulverston. It then appraises the viability of the subject site and the neighbouring sites being brought forward for an exclusively B1 based development, concluding that a scheme restricted to this single use is currently unviable and is likely to remain so for the foreseeable future. It then goes on to show how a new phased business space development may be brought forward on a viable basis if an enabling use is first developed that can finance the major infrastructure and site costs required to open up the remainder of the site for development.

2. PROPERTY MARKET OVERVIEW

2.1 Economic and Local Background

The latest economic data presents a picture of continuing weakness in the UK economy with GDP figures confirming that the economy overall has practically flat-lined over the past year. Given the deterioration in global economic growth and the on-going Eurozone sovereign debt crisis, downside risks have increased and growth forecasts for the UK have been downgraded. Colliers International believe that the uncertainty created by the lack of a credible political solution for the future of the Eurozone continues to be a significant factor affecting decisions by investors and developers in commercial property. The UK economy now looks set for a period of very weak growth and perhaps potentially slipping back into recession. As a result, economic and financial conditions for UK occupiers will remain extremely challenging. Against this background, it is hardly surprising that Colliers International reported that total demand nationally for office and industrial space, which increased in 2010, fell back in in 2011.

The South Lakeland District is a sparsely populated part of Britain, with a population 103,700, and is comparatively isolated from the rest of the country. Ulverston is the principal town in the west of the South Lakeland area; it is situated on the main A590 trunk road to Barrow-in-Furness and has a population of circa 11,500 people. Approximately 5,151 people are employed in the town and surrounding area, accounting for 10.7% of the working population in South Lakeland. Ulverston, similar to the rest of the UK, experienced significant economic growth at the start of the last decade, which was followed by an economic downturn, however the area has remained relatively resilient.

The town has been greatly boosted by recently announced investments in the area. Forge Europa have invested £1m to expand their current operation, which should hopefully create new jobs. Glaxo Smith Klein (GSK) on 22nd March 2012 announced plans to invest £350m in a state-of-the-art biopharmaceutical factory to be built in Ulverston. GSK have been a major employer in the areas for many years, however they have scaled back their operation in Ulverston significantly in recent times. GSK currently employ around 240 people and it is anticipated the investment will create an additional 500 jobs. Without this investment it was feared they would leave the town completely.

Other large companies located in Ulverston include Marl International, McGeoch, Chromatechnic, Oxley Developments and Expro Connectors who were purchased by the Siemens Group on 20th March 2012. The town also benefits from being within close proximity of the BAE Systems facility in Barrow-in-Furness.

2.2 The Office and Industrial Property Markets in Ulverston

Colliers International have reviewed on-line data to produce a desk top view of the historic take up of office and industrial floor space in the Ulverston area over the last three years. The details of lettings identified by this work are summarised below:-

Building	Town	Event Date	Deal Type	Size Sq Ft	Achieved Rent (£)	Achieved Rent (£ per Sq Ft)
Unit 5a & 5e North Lonsdale Ind. Estate, North Lonsdale Road	Ulverston	20/05/2011	Letting	1,012	4,250	£4.20

The letting listed above is the only publicly registered transaction that has taken place in Ulverston since January 2009. This is perhaps not surprising as the general uptake of office and industrial space has been subdued in recent years due to the general economic downturn.

The geographical location of Ulverston and resulting poor motorway links mean that it holds little attraction for large distribution and logistics firms. Consequently, the market share for such space is very limited.

The area does however enjoy a strong history of high-tech manufacturing and pharmaceutical research. These key sectors have been the main drivers for business space demand in the area over the last couple of decades with a number of companies and their supply chain partners having requirements.

On a national basis, office and industrial rents have been driven down over the last few years and incentives have increased markedly, although some recent evidence suggests that incentives may be hardening. The South Lakeland area and Ulverston itself has probably tracked this national trend, albeit there is limited market evidence to substantiate this view.

Equally, freehold transactions have also been heavily reduced as the economy has shrunk, bank finance has become more difficult to obtain and investors have become reluctant to acquire due to the increased business rates liabilities.

2.3 The Current Availability of Office and Industrial Space in Ulverston

The Ulverston area currently has circa 5,584 sq ft of available office space and 55,700 sq ft of available industrial space as summarised in the tables below:-

Office Availability

Building	Sq Ft Available	Tenure	Sale Price	Sale Price	Rent Sq Ft
The Old Auction House, Brogden Street	500	Leasehold/ Freehold	£79,500	£79,500	£15.00
Unit 6, Daltongate Business Centre	1,084	Leasehold	n/a	Not Applicable	£10.10
Coniston House, New Market Street	4,000	Leasehold	n/a	Not Applicable	£10.00

The office market in Ulverston is very limited. The only two vacancies of any scale and which offer modern space are The Daltongate Business Centre with 1,000 sq ft available and Coniston House on New Market Street with 4,000 sq ft available. Both units are being marketed at £10 per sq ft and have been on the market for a considerable amount of time.

Industrial Availability

Building	Sq Ft Available	Tenure	Sale Price	Sale Price	Rent Sq Ft
Former Gcw Waite, Lightburn Road	9,854	Leasehold	n/a	Not Applicable	£3.30
Units 7-13 Lightburn Trading Estate, Lightburn Road	2,400	Long Leasehold/ Leasehold	£295,000	£295,000	NQ
Gcw Waite And Co Ltd, North Lonsdale Road	5,315	Freehold	£225,000	£225,000	n/a
Unit 3 North Lonsdale Ind. Estate North Lonsdale Road	7,947	Leasehold	n/a	Not Applicable	£2.20
North Lonsdale Road	7,055	Leasehold	n/a	Not Applicable	£2.55
Northern Site, North Lonsdale Road	23,129	Leasehold	n/a	Not Applicable	NQ

The main industrial sites in Ulverston are North Lonsdale Road Industrial Estate and Low Mill Business Park. Cross Lane Industrial Estate is a new development with units ranging from 930 sq ft to 1,920 sq ft. Demand for units in Ulverston is very localised and generally for units of under 10,000 sq ft.

2.4 Requirements for Office and Industrial Space in South Lakeland

The office and industrial markets across the area remain subdued in light of the wider economic climate; however Ulverston is the second most important employment area in South Lakeland after Kendal. The registered larger office and industrial requirements for Ulverston are outlined below; however these are regional requirements for the South Lakeland area rather than being specific to Ulverston.

Office Requirements

Client	Requirement Date	Agent	Area
No Client Quoted	23/02/2011	Third Sector Property	2,000-3,500
No Client Quoted	07/01/2011	CB Richard Ellis	40,000-70,000
No Client Quoted	30/11/2010	First London Group	
No Client Quoted	03/12/2009	Thompsons	
Group 4 Securicor	07/07/2009		
No Client Quoted	15/06/2009	Short Stay Property	10,000-500,000
No Client Quoted	01/04/2009	Brecker Grossmith & Co	

Industrial Requirements

Client	Requirement Date	Agent	Area
No Client Quoted	26/01/2010	Dent & Partners	10,000-25,000
No Client Quoted	21/09/2009	Ostroumoff	1-5 Acres
No Client Quoted	15/06/2009	Short Stay Property	10,000-300,000
No Client Quoted	27/02/2009	Dalton Warner Davis	18-20 Acres
No Client Quoted	06/02/2009	Harrisons	50,000-60,000

In Ulverston, both the level of demand and supply is limited, and as concluded in the South Lakeland Employment Land Review (SLELR), Ulverston is considered to have sufficient supply of existing stock to meet the local employment needs. Any larger requirements would need to be met through the development of the allocated employment sites.

Due to a lack of demand and the onerous business rates liability once built, currently no speculative industrial development is taking place across the whole of South Lakeland region as far as we are aware.

From a general perspective, it is our opinion that demand for business space in Ulverston comes predominantly from local businesses together with the some demand from high-tech manufacturing and pharmaceutical research companies, although the latter is focused primarily on a handful of occupiers. We believe future demand is likely to be for small B1 type units of 5,000 to 10,000 sq ft gross internal area.

3. EMPLOYMENT LAND SUPPLY

The South Lakeland Core Strategy (CS) was adopted in October 2010 and outlines a requirement of 60 hectares of employment land (4 hectares per annum) for the region over the period of the strategy up to 2025. According to Cumbria County Council's Annual Employment Availability Review from March 2011, the South Lakeland area currently has 16.04 hectares allocated for employment land in the form of 12 sites each of over 0.25 hectares, although the Council is progressing with its Land Allocation DPD which will update the employment land allocations for the Borough.

As part of the SLELR a comprehensive review of the overall requirement for employment land was considered. The findings of the review suggested that a more appropriate overall requirement for employment land over the period of the plan would be 36 hectares, when considering levels of take up and demand. The SLELR also considered the sites within the Proposed Land Allocation DPD and suggested the adoption of a total of 51.52 hectares of allocated employment sites within the Land Allocation DPD.

The CS identifies a need for the allocation of 13 hectares of land for employment uses to meet the needs of Ulverston. The CS specifically outlines the requirement for 6 hectares for strategic employment needs, 6 hectares for offices and high-tech industry and 1 hectare should be aimed for employment needs. The strategy seeks to locate industrial and distribution uses in easily accessible locations close to the main highway infrastructure whilst focusing office development around Ulverston Town Centre. The SELR identifies 11.78 hectares of appropriate sites from the Proposed Land Allocations DPD for Ulverston, which is up from the 7.2 hectares outlined in the current CS.

Although the aspiration of the Proposed Land Allocations DPD is to provide only B1 uses on the subject site, the recommendation within the SLELR is to take a more flexible approach to allocations in the interests of delivering schemes.

The review concludes that the focus should be on providing sites which are suitable for the full range of Class B uses to provide competition for sites and offering more scale to improve the viability of schemes.

It goes on to identify the need for part of the subject site to be released for a higher value use to ensure the delivery of the overall site for employment uses.

4. APPRAISAL OF HYPOTHETICAL B1 USE DEVELOPMENT ON SUBJECT SITE

In order to illustrate our opinion of the current potential viability of a business/science park development on the entirety of the subject site plus the three adjoining sites, Colliers International have undertaken a development appraisal of a hypothetical scheme.

Whilst a scheme plan has not been produced for this hypothetical scheme, we have estimated that the combined site including all the neighbouring land extending to circa 11.2 acres could be capable of accommodating circa 151,200 sq ft gross internal area of B1 space. This is based on advice from our Business Space agency team who have suggested that a development density of 15,000 sq ft gross external area per acre would probably be appropriate for this site.

The development appraisal that we have prepared for this hypothetical scheme of circa 151,200 sq ft is attached at Appendix 3 and it is based on the assumptions set out in the table below:-

Appraisal Input	Adopted Assumption	Comments
Site Area	11.2 acres	Fixed amount estimated from plans
Development Area (GEA)	168,000 sq ft	This is based on a development density of 15,000 sq ft GEA per acre
Development Area (GIA)	151,200 sq ft	This is based on 90% of the GEA
Build Costs per sq ft of GEA	£41.50 per sq ft	Cost provided by Henry Riley Consulting
Enabling Construction Costs	£1,585,000	Cost provided by Henry Riley Consulting
Purchase to Construction Completion Phase	30 months	Assumed period to include planning application time and construction of development as a single phase
Letting Void	12 months	Assumed all units are let 12 months after practical completion
Interest Rate	7%	Based on Colliers International opinion
Purchasers Costs	5.80%	Standard market assumption
Assumed Lease Term	10 years	Assumed lease term
Rent	£7 per sq ft	See comments below
Initial Yield	8.5%	Based on Colliers International opinion
Site Acquisition Price	£100,000 per acre	Based on Colliers International opinion of approximate potential land acquisition price for business space development
Stamp Duty	4%	Standard market assumption
Agents Acquisition Fee	1%	Standard market assumption
Agents Acquisition Fee	0.5%	Standard market assumption
Rent Free Period	18 months	Based on Colliers International opinion to achieve 10 year lease terms that may include five year break options
Developers Contingency	10%	Standard market assumption. Set at 10% to reflect the extent of development.
Construction Professional Fees	15%	Standard market assumption

Agents Letting Fee	10%	Standard market assumption
Legal Letting Fee	5%	Standard market assumption
Agents Sale Fee	1%	Standard market assumption
Legal Sale Fee	0.50%	Standard market assumption

The development appraisal projects that the hypothetical scheme would make a loss of circa £3,332,327, which shows a negative profit on cost ratio of -22.12%. This shows very clearly that a potential development based on a scheme comprising 100% B1 space is unviable in the current market based on the assumptions that we have adopted.

We appreciate that it is unrealistic to assume that the whole development would be undertaken at one time, as it is more likely to be brought forward in phases as demand comes forward for specific units. Indeed, a design and build approach to deliver space to satisfy specific requirements is the most likely approach. Adopting this phased approach may reduce the void and finance costs in the appraisal, but is unlikely to significantly improve the appraisal in other respects. Even if the full cost allowance for rent free periods and finance costs were removed from our appraisal, which in itself is an unrealistic assumption, the scheme would still show a loss. As such, we believe that the approach of appraising the scheme as a whole as a single phase is an appropriate approach to gauge the schemes potential overall viability for a full B1 development.

Looking at other variables, if we assume that the construction costs for the new units are reasonably fixed, the main drivers that could improve viability are rent, land cost and yield.

Our research into office rents in Ulverston has shown that current figures are in the order of £10 per sq ft, whilst available industrial space is being offered at figures in the order of £2.50 to £4.50 per sq ft. As the hypothetical scheme would be B1 giving the opportunity for office or light industrial uses, we have adopted a blended rental rate of £7 per sq ft. We believe this to be a reasonable assumption. However, even if the rental rate was increased to £10 per sq ft throughout, the appraisal only shows a profit on cost ratio of 5.48%, which is substantially below the minimum 15% to 20% that we believe developers would require for a scheme of this nature.

If the scheme were offered to the market today, we believe a yield of around 10% would be appropriate based on current market conditions. Our adopted appraisal yield of 8.5% assumes the scheme is developed in a few years in a stronger investment market as the economy hopefully improves. It assumes that the units are let to a reasonable mix of covenants on 10 year leases, with five yearly rent reviews, with some leases perhaps having tenant break options at year 5. We would not wish to project a better yield as we believe 8.5% is unlikely to be bettered on a scheme of this nature for some years to come. As such, we do not believe that it is realistic to project a yield shift that may improve viability.

Our appraisal assumes a land cost of £100,000 per acre, which we believe to be a reasonable view of the figure that a vendor may seek when considering the values that may be created by other uses. However, if we re-run our appraisal assuming no land cost and with all other assumptions remaining the same, it still loses £1,454,000.

It is important to remember that the hypothetical scheme is being appraised in a time of uncertainty for both occupiers and developers, which is reflected in the assumptions adopted. We believe that the assumptions that we have adopted are reasonable in today's market and we have examined some of the changes that could improve the viability of the scheme in the future. We have however concluded that in our opinion any development of the site that is based on 100% B1 space will continue to be unviable for at least the next 5 years and probably beyond.

5. ENABLING CONSTRUCTION COSTS

As well as the generally low levels of demand for business space in the Ulverston area, one of the main barriers to this site being brought forward is the high level of enabling construction costs that need to be met before any form of development can take place. These have been estimated by Henry Riley Consulting to total circa £1,585,000 and this figure is broken down as follows:-

- Provision of incoming services £385,000
- Ground works £400,000
- Highways works £800,000

Henry Riley have caveated this figure indicating that it may be conservative, particularly if services costs are higher than expected and as such this presents a further downside risk for any appraisal.

As was clearly shown by our appraisal as set out under section 4 of this report, a pure business space development is likely to remain unviable even with any future improvement in market conditions. This is exacerbated by the cost of the enabling works at circa £1,585,000 and options to phase the development will also be limited due to the need to recoup this high level of capital expenditure on the enabling works for the site in the first phase of the development

Therefore, in order to bring this development forward for any form of development and particularly to facilitate the delivery of business space development on a part of the site, we believe that a high value use needs to be developed in the first phase that can meet the full cost of these enabling works.

This would then remove a significant barrier to the delivery of business space development and this is illustrated further in the next section of this report.

6. MASTER PLAN DEVELOPMENT APPRAISALS

6.1 The Masterplan Scheme

Our clients architects have produced a potential masterplan proposal for the entire Lightburn Road site as attached at Appendix 4. This shows a mixed use development that includes a foodstore with a gross internal area of 38,040 sq ft, together with a mix of business space units totalling 46,500 sq ft at ground floor level

A food store is use is considered to be the most appropriate form of enabling development due to the high land values that is can create and consequently the development costs that it can absorb. In our opinion, no other development use can produce sufficient value to meet the high enabling construction cost required to bring forward the subject site.

It is also worth noting that building an attractive food store on part of the site is likely to have a 'halo' type effect on the remainder making it more attractive for other forms of development. This in turn makes it more likely that the business space units will be built.

The business space units in the masterplan are designed in four distinct areas to match the four ownerships, being the remainder of the subject site controlled by Sainsbury's/Rawdon Developments and the three other sites that are in separate ownerships. It is assumed that the enabling construction works outlined under section 5 of this report would be undertaken as part of the initial food store development and this would include providing access roads up to the edge of the four business space sites. As such, those sites could then be brought forward as soon as demand allows with the only development costs for each parcel being the cost of buying the land and constructing the floor space within each site's own boundary.

Whilst this masterplan scheme is contrary to the proposal within the Proposed Land Allocation DPD that show the site exclusively for B1 use only, it is supported by the SLELR which identifies the potential need for part of the subject site to be released for higher value uses to ensure the delivery of the overall site.

6.2 Food Store Development Appraisal

Colliers International have undertaken a development appraisal to demonstrate the viability of developing a foodstore to act as an enabling development that will then facilitate the delivery of business space development on the remainder of the Lightburn Road site.

The foodstore development appraisal is attached at Appendix 5 and is based on the following assumptions:-

Appraisal Input	Adopted Assumption	Comments
Site Area	6.35 acres	Fixed amount estimated from plans

Development Area (GIA)	38,040 sq ft	Area based on Sainsbury's current proposals
Build Costs per sq ft of GIA	£135 per sq ft	Cost provided by Henry Riley Consulting and includes an allowance for the enabling construction work
Purchase to Construction Completion Phase	30 months	Assumed period to include planning application time and construction of development as a single phase
Purchasers Costs	5.80%	Standard market assumption
Assumed Lease Term	25 years	Assumed lease term based on market evidence
Rent	£18 per sq ft	Based on Colliers International opinion
Initial Yield	5%	Based on Colliers International opinion
Site Purchase Price	£8,000,000	Estimated site purchase price based on market evidence of food store land values assuming a planning consent has been obtained and equating to approximately £1.25 million per acre
Stamp Duty	4%	Standard market assumption
Agents Acquisition Fee	1%	Standard market assumption
Agents Acquisition Fee	0.5%	Standard market assumption
Construction Professional Fees	10%	Standard market assumption for a food store
Agents Letting Fee	10%	Standard market assumption
Legal Letting Fee	5%	Standard market assumption
Agents Sale Fee	1%	Standard market assumption
Legal Sale Fee	0.50%	Standard market assumption

This development appraisal for the foodstore aspect of the masterplan shows a loss of -£1,485,025, which reflects a negative profit on cost ratio of -10.32% based on the assumptions set out above.

This appraisal has been produced from the perspective of a developer who would take the traditional approach of buying the land once a planning consent for the food store had been obtained and then would build out the scheme based on the security of an agreement to lease the store to Sainsbury's. It clearly shows that the foodstore development would not be viable for a developer on this basis given the high costs of development and limited scale of store. However, Sainsbury's have confirmed their appetite to deliver this store directly based on the land cost shown in the appraisal.

As such, we can conclude that a food store development may not be viable for a developer on a traditional basis, but it can be brought forward directly by an operator who is able to take a view on the trading potential from the site and therefore can afford higher development costs than a pure property developer. Therefore, subject to securing an acceptable planning consent for the store, in bringing it forward for development and meeting all the development costs shown in the appraisal including the enabling construction works, Sainsbury's can open up this site for further development.

In turn, this means that future business space developments of the remainder of the site will not have to meet the cost of the enabling construction works making them potentially more viable as shown in the next section of this report.

6.3 Business Space Plot Development Appraisals

We have produced four development appraisals for the four potential business space plots shown in the masterplan to illustrate the viability of these for development assuming that the food store development has already met the enabling works costs and has provided access and services to the other plots.

The fact that each plot would not have to meet any large up front enabling costs means that they can be brought forward individually in phases to satisfy specific requirements. This in turn means that slightly better rents and lower void and letting incentives can be assumed and they have a much better chance of actually being delivered.

The assumptions adopted in the four development appraisals attached at Appendix 6 are set out below:-

Appraisal Input	Adopted Assumption	Comments
Site Area	4.91 acres	The site area is the combined total of the four separate titles as shown on the plan attached in Appendix 1
Development Area (GEA)	46,500sq ft	The development area is the combined area of the B1 units from the Masterplan Proposal Plan
Development Area (GIA)	41,850 sq ft	This is based on 90% of the GEA
Build Costs per sq ft of GEA	£41.50 per sq ft	Cost provided by Henry Riley Consulting
Purchase to Construction Completion Phase	30 months	Assumed period to include planning application time and construction of development as a single phase
Interest Rate	7%	Based on Colliers International opinion
Purchasers Costs	5.80%	Standard market assumption
Assumed Lease Term	10 years	Assumed lease term to influence yield
Rent	£8 per sq ft	See comments below
Initial Yield	8.5%	Based on Colliers International opinion
Developers Profit on Cost	15%	Based on Colliers International's opinion
Stamp Duty	0%	No SDLT would be payable as all the appraisal residual values are under the £150,000 threshold.
Agents Acquisition Fee	1%	Standard market assumption
Agents Acquisition Fee	0.5%	Standard market assumption
Rent Free Period	12 months	Based on Colliers International opinion to achieve 10 year lease terms that may include five year break options. The figure is reduced from that adopted in the hypothetical scheme in

		section 4 of this report as the units will be built to suit specific rather than speculative occupier requirements
Developers Contingency	5%	The reduced contingency figure compared to the hypothetical scheme reflects the reduced risk of the construction with the enabling works already in place
Construction Professional Fees	15%	Standard market assumption
Agents Letting Fee	10%	Standard market assumption
Legal Letting Fee	5%	Standard market assumption
Agents Sale Fee	1%	Standard market assumption
Legal Sale Fee	0.50%	Standard market assumption

These appraisals have been produced on the basis of a developer seeking a profit on cost ratio of 15% and then show the residual value that can be attributed to each development plot in terms of the land value that could be paid.

The appraisals show the following results:-

Plot	Projected Profit	Projected Return on Cost	Projected Residual Land Value Per Acre
1	£104,078	15%	£52,169
2	£179,014	15%	£72,740
3	£42,788	15%	£26,569
4	£154,035	15%	£111,414

Based on the assumptions used, these appraisals show that Plots 1, 2 and 4 can potentially be brought forward by developers seeking a 15% return on cost for B1 use and allow for the payment of land values of between £52,169 and £111,414 per acre. These figures are believed to be reasonable reflections of the figures that might be required to acquire the land for this type of development. Indeed, for Plot 1, the acquisition price has already been covered by the assumed acquisition of the land by Sainsbury's as part of the food store scheme and therefore the land price and profit could be combined to make development even more attractive in financial terms.

The appraisal of Plot 3 shows that it is less viable, but this reflects that small size of the plot and the low development density that can be achieved.

Overall these appraisals clearly illustrate that viable B1 type developments could be brought forward on these four plots if the food store development has taken place and has met the enabling construction costs for the site. This approach not only meets those infrastructure costs in financial terms, but removes much of the development risk for the remaining sites as they could be pre-let and developed once an occupier is secured and the developer would not have exposure to other site cost

risk. Further, the development of the food store as a first phase would establish development in the location and make it an attractive place for B1 occupiers to locate their businesses.

7 CONCLUSION

The CS outlines a requirement for 60 hectares of employment land for the South Lakeland Borough, however the SLELR has recommended the adoption 36 hectares as a more appropriate figure following a review of the Proposed Land Allocation DPD. Also, as part of the SLELR, Lambert Smith Hampton undertook a comprehensive review of allocated employment sites and recommended a revised allocation of 51.52 hectares. Based on the findings of the SLELR, Colliers International consider that region will have a sufficient supply of employment land to satisfy the requirements over the area to 2025 and would offer a good levels of choice and flexibility for potential occupiers.

The protection of employment in Ulverston and Kendal is important to the area and growth should be centred around the principle service centres. Recent announcements regarding investments in Ulverston should hopefully generate new jobs. However Colliers International believe that the Council should adopt a flexible approach to the allocation of sites within the Land Allocations DPD to allow a mix of uses to enable development for employment use. A strict rigid approach could seriously hinder the development of Ulverston and the wider area.

The appraisals in this report clearly show that a full scale development of B1 units on the subject site is unviable and very unlikely to be delivered without some form of enabling development. The two main reasons for the poor viability are the cost of providing the infrastructure for the site and the generally limited market for business space in the Ulverston area.

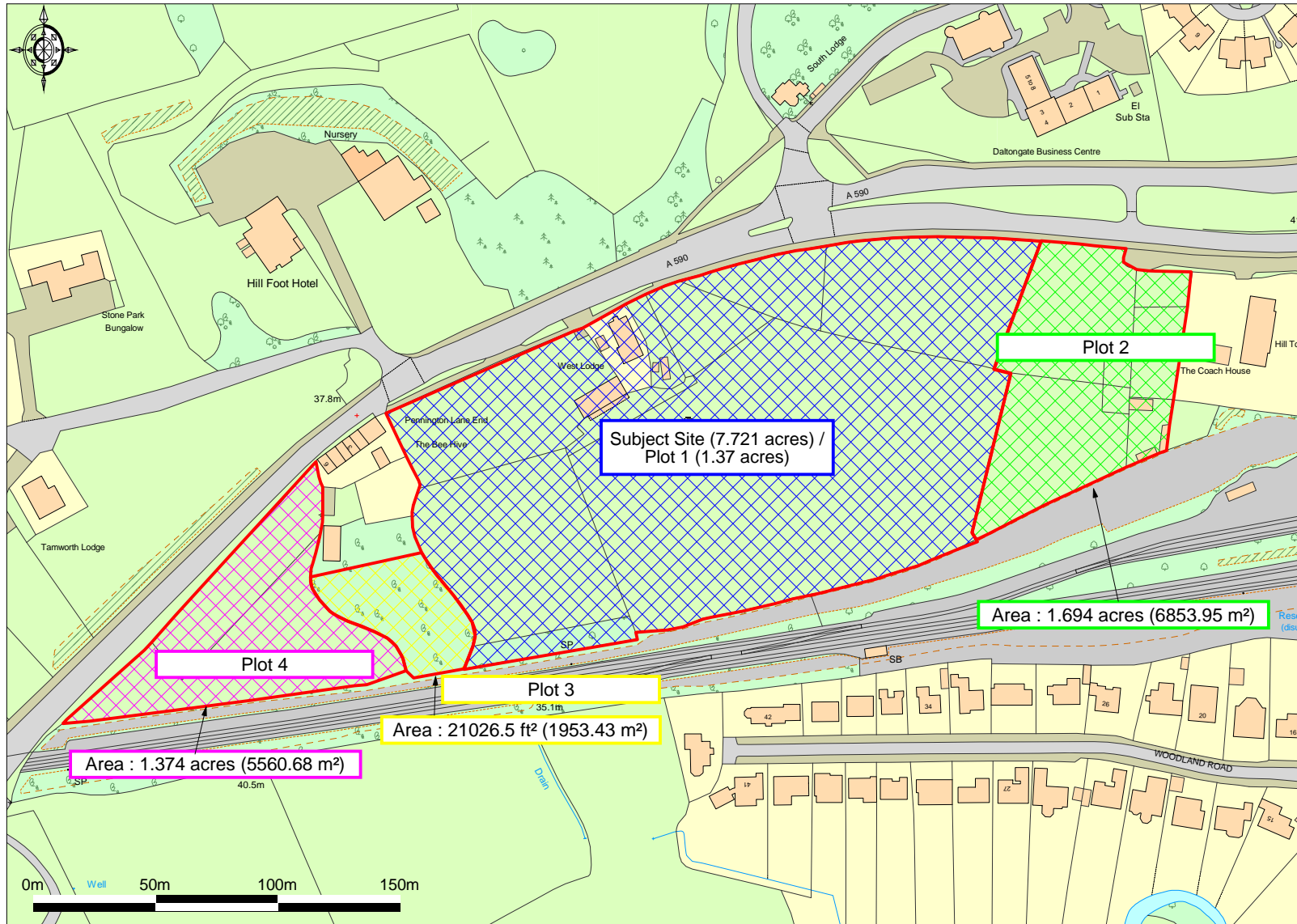
The mixed use masterplan appraisals show that allowing a higher value use as part of any development can act as an enabler for the delivery of the remainder of the scheme even in today's challenging market. By having the enabling infrastructure already in place and financed by the enabling use also allows for more focused phased development and units which are more specifically designed and constructed for the individual needs of occupiers.

In conclusion, the subject site offers a realistic development opportunity within the Ulverston area, but we do not believe it will ever be developed for B1 use in isolation due to the low levels of demand and the need to finance the high barrier costs in terms of the enabling construction costs from the first phase of development.

However, we believe that B1 development can be secured on the site as part of a mixed use scheme that includes a high value enabling use. We believe that the only use that can generate sufficient value to enable the development of the whole site and to secure the B1 elements is food retail and we have shown how that can make the overall masterplan scheme viable and deliverable.

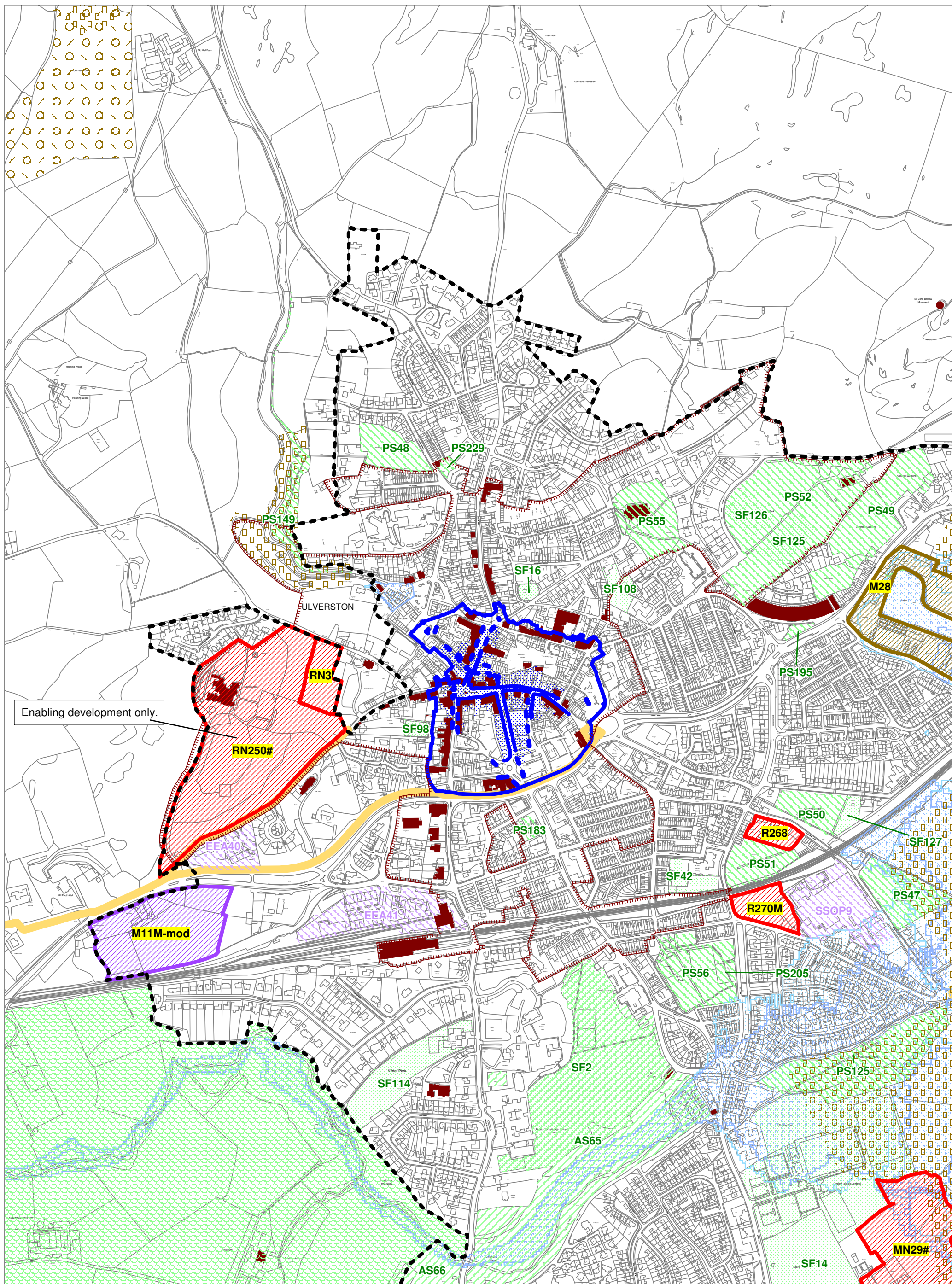
APPENDIX 1 SITE PLAN

Ulverston Site Area Plan



Ordnance Survey © Crown Copyright 2012. All rights reserved. Licence number 100020449. Plotted Scale - 1:2500

APPENDIX 2 EMPLOYMENT SITE ALLOCATION PLAN



APPENDIX 3 HYPOTHETICAL FULL B1 DEVELOPMENT APPRAISAL

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Development Appraisal

Ulverston

Hypothetical Scheme - Full B1 Development

Report Date: 12 April 2012

APPRAISAL SUMMARY**LICENSED COPY****Ulverston****Hypothetical Scheme - Full B1 Development****Summary Appraisal for Phase 1****REVENUE****Rental Area Summary**

	Units	ft ²	Rate ft ²	Initial MRV/Unit	Net Rent at Sale	Initial MRV
Business / Science Park Space	1	151,200	£7.00	£1,058,400	1,058,400	1,058,400

Investment Valuation**Business / Science Park Space**

Market Rent	1,058,400	YP @	8.5000%	11.7647	12,451,765
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GROSS DEVELOPMENT VALUE

Purchaser's Costs	5.80%	(722,202)	12,451,765
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NET DEVELOPMENT VALUE11,729,562**NET REALISATION****11,729,562****OUTLAY****ACQUISITION COSTS**

Fixed Price (11.20 Acres £100,000.00 pAcre)	1,120,000
Stamp Duty	4.00% 44,800
Agent Fee	1.00% 11,200
Legal Fee	0.50% 5,600
	1,181,600

CONSTRUCTION COSTS

Construction	ft ²	Rate ft ²	Cost
Business / Science Park Space	168,000	£41.50	6,972,000

6,972,000

Contingency	10.00%	697,200
		697,200

Other Construction

Services	385,000
Groundworks	400,000
Highways	800,000
	1,585,000

PROFESSIONAL FEES

Construction Professional Fees	15.00%	1,283,550
		1,283,550

MARKETING & LETTING

Letting Agent Fee	10.00%	105,840
Letting Legal Fee	5.00%	52,920
		158,760

DISPOSAL FEES

Sales Agent Fee	1.00%	117,296
Sales Legal Fee	0.50%	58,648
		175,943

RENT FREE COSTS

Business / Science Park Space	18 mths	1,587,600
		1,587,600

FINANCE

Debit Rate 7.000% Credit Rate 0.000% (Nominal)	
Land	215,790
Construction	323,548
Letting Void	880,897
Total Finance Cost	1,420,236

TOTAL COSTS**15,061,889****PROFIT****(3,332,327)****Performance Measures**

Profit on Cost%	(22.12)%
Profit on GDV%	(26.76)%
Profit on NDV%	(28.41)%

Ulverston**Hypothetical Scheme - Full B1 Development**

Development Yield% (on Rent)	7.03%
Equivalent Yield% (Nominal)	8.50%
Equivalent Yield% (True)	8.97%

IRR	(9.97)%
-----	---------

Rent Cover	-3 yrs -2 mths
Profit Erosion (finance rate 7.000%)	N/A

APPENDIX 4 MASTERPLAN PROPOSAL PLAN

AREA SCHEDULE

UNIT 1	5,000 sqft / 465 sqm (Ground floor GEA)
UNIT 2	5,000 sqft / 465 sqm (Ground floor GEA)
UNIT 3	4,800 sqft / 446 sqm (Ground floor GEA)
UNIT 4	4,500 sqft / 418 sqm (Ground floor GEA)
UNIT 5	5,000 sqft / 465 sqm (Ground floor GEA)
UNIT 6	5,000 sqft / 465 sqm (Ground floor GEA)
UNIT 7	3,700 sqft / 344 sqm (Ground floor GEA)
UNIT 8	5,000 sqft / 465 sqm (Ground floor GEA)
UNIT 9	4,250 sqft / 395 sqm (Ground floor GEA)
UNIT 10	4,250 sqft / 395 sqm (Ground floor GEA)

APPROX TOTAL AREA 46,500 sqft / 4,323 sqm GEA

Sketch masterplan layout subject to topographical survey. All areas & number of car parking spaces subject to detail design & client requirements.



LIGHTBURN ROAD | ULVERSTON
INDICATIVE MASTERPLAN

ARCH | 2009-171 | MP01 | REV B | NTS | 15.03.2012

Hadfield Cawkwell Davidson

17 Broomgrove Rd, Sheffield, S10 2LZ. T 0114 266 8181 F 0114 266 6246 www.hcd.co.uk

Architecture|Engineering|InteriorDesign|Masterplanning|UrbanDesign

APPENDIX 5 MASTERPLAN FOODSTORE DEVELOPMENT APPRAISAL

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Development Appraisal

Ulverston

Masterplan Foodstore Appraisal

Report Date: 11 April 2012

APPRAISAL SUMMARY**LICENSED COPY****Ulverston
Masterplan Foodstore Appraisal****Summary Appraisal for Phase 1****REVENUE****Rental Area Summary**

	Units	ft ²	Rate ft ²	Initial MRV/Unit	Net Rent at Sale	Initial MRV
Foodstore	1	38,040	£18.00	£684,720	684,720	684,720

Investment Valuation

Foodstore						
Current Rent	684,720	YP @	5.0000%	20.0000	13,694,400	

GROSS DEVELOPMENT VALUE 13,694,400

Purchaser's Costs 5.80% (794,275)

NET DEVELOPMENT VALUE 12,900,125**NET REALISATION****12,900,125****OUTLAY****ACQUISITION COSTS**

Fixed Price			8,000,000	
Stamp Duty		4.00%	320,000	
Agent Fee		1.00%	80,000	
Legal Fee		0.50%	40,000	
				8,440,000

CONSTRUCTION COSTS

Construction	ft ²	Rate ft ²	Cost	
Foodstore	38,040	£135.00	5,135,400	5,135,400

PROFESSIONAL FEES

Professional Fees	10.00%	513,540	
			513,540

MARKETING & LETTING

Letting Agent Fee	10.00%	68,472	
Letting Legal Fee	5.00%	34,236	
			102,708

DISPOSAL FEES

Sales Agent Fee	1.00%	129,001	
Sales Legal Fee	0.50%	64,501	
			193,502

TOTAL COSTS**14,385,150****PROFIT****(1,485,025)****Performance Measures**

Profit on Cost%	(10.32)%
Profit on GDV%	(10.84)%
Profit on NDV%	(11.51)%
Development Yield% (on Rent)	4.76%
Equivalent Yield% (Nominal)	5.00%
Equivalent Yield% (True)	5.16%
IRR	(6.44)%
Rent Cover	-2 yrs -2 mths
Profit Erosion (finance rate 0.000%)	N/A

APPENDIX 6.1 MASTERPLAN B1 DEVELOPMENT APPRAISAL – PLOT 1

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Development Appraisal

Ulverston

Masterplan B1 Development - Plot 1

Report Date: 12 April 2012

APPRAISAL SUMMARY**LICENSED COPY****Ulverston****Masterplan B1 Development - Plot 1****Summary Appraisal for Phase 1****REVENUE****Rental Area Summary**

	Units	ft ²	Rate ft ²	Initial MRV/Unit	Net Rent at Sale	Initial MRV
Unit 5	1	4,500	£8.00	£36,000	36,000	36,000
Unit 6	1	4,500	£8.00	£36,000	36,000	36,000
Totals	2	9,000			72,000	72,000

Investment Valuation**Unit 5**

Market Rent	36,000	YP @ 8.5000%	11.7647	423,529
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Unit 6

Market Rent	36,000	YP @ 8.5000%	11.7647	423,529
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847,059

GROSS DEVELOPMENT VALUE

Purchaser's Costs

5.80% (49,129)

847,059

NET DEVELOPMENT VALUE

797,929**NET REALISATION****797,929****OUTLAY****ACQUISITION COSTS**

Residualised Price (1.37 Acres £52,169.07 pAcre)

71,472

Agent Fee 1.00% 715

Legal Fee 0.50% 357

72,544

CONSTRUCTION COSTS

Construction	ft ²	Rate ft ²	Cost
Unit 5	5,000	£41.50	207,500
Unit 6	5,000	£41.50	207,500
Totals	10,000		415,000

415,000

Contingency 5.00% 20,750

20,750

PROFESSIONAL FEES

Construction Professional Fees 15.00% 62,250

62,250

MARKETING & LETTING

Letting Agent Fee 10.00% 7,200

Letting Legal Fee 5.00% 3,600

10,800

DISPOSAL FEES

Sales Agent Fee 1.00% 7,979

Sales Legal Fee 0.50% 3,990

11,969

RENT FREE COSTS

Unit 5 12 mths 36,000

Unit 6 12 mths 36,000

72,000

FINANCE

Debit Rate 7.000% Credit Rate 0.000% (Nominal)

Land 13,248

Construction 15,290

Total Finance Cost 28,539

TOTAL COSTS**693,851****PROFIT****104,078****Performance Measures**

Profit on Cost% 15.00%

Profit on GDV% 12.29%

Ulverston**Masterplan B1 Development - Plot 1**

Profit on NDV%	13.04%
Development Yield% (on Rent)	10.38%
Equivalent Yield% (Nominal)	8.50%
Equivalent Yield% (True)	8.97%

IRR	28.39%
-----	--------

Rent Cover	1 yr 5 mths
Profit Erosion (finance rate 7.000%)	2 yrs

APPENDIX 6.2 MASTERPLAN B1 DEVELOPMENT APPRAISAL – PLOT 2

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Development Appraisal

Ulverston

Masterplan B1 Development - Plot 2

Report Date: 12 April 2012

APPRAISAL SUMMARY**LICENSED COPY****Ulverston****Masterplan B1 Development - Plot 2**

Summary Appraisal for Phase 1

REVENUE**Rental Area Summary**

	Units	ft ²	Rate ft ²	Initial MRV/Unit	Net Rent at Sale	Initial MRV
Unit 7	1	3,330	£8.00	£26,640	26,640	26,640
Unit 8	1	4,500	£8.00	£36,000	36,000	36,000
Unit 9	1	3,825	£8.00	£30,600	30,600	30,600
Unit 10	<u>1</u>	<u>3,825</u>	£8.00	£30,600	<u>30,600</u>	<u>30,600</u>
Totals	4	15,480			123,840	123,840

Investment Valuation

Unit 7					
Market Rent	26,640	YP @	8.5000%	11.7647	313,412
Unit 8					
Market Rent	36,000	YP @	8.5000%	11.7647	423,529
Unit 9					
Market Rent	30,600	YP @	8.5000%	11.7647	360,000
Unit 10					
Market Rent	30,600	YP @	8.5000%	11.7647	360,000
					1,456,941

GROSS DEVELOPMENT VALUE

Purchaser's Costs 5.80% (84,503) 1,456,941

NET DEVELOPMENT VALUE

1,372,439**NET REALISATION****1,372,439****OUTLAY****ACQUISITION COSTS**

Residualised Price (1.69 Acres £72,740.37 pAcre)	122,931
Agent Fee 1.00%	1,229
Legal Fee 0.50%	615
	124,775

CONSTRUCTION COSTS

Construction	ft ²	Rate ft ²	Cost	
Unit 7	3,700	£41.50	153,550	
Unit 8	5,000	£41.50	207,500	
Unit 9	4,250	£41.50	176,375	
Unit 10	4,250	£41.50	176,375	
Totals	<u>17,200</u>		<u>713,800</u>	713,800
Contingency		5.00%	35,690	35,690

PROFESSIONAL FEES

Construction Professional Fees	15.00%	107,070	107,070
--------------------------------	--------	---------	---------

MARKETING & LETTING

Letting Agent Fee	10.00%	12,384	
Letting Legal Fee	5.00%	6,192	18,576

DISPOSAL FEES

Sales Agent Fee	1.00%	13,724	
Sales Legal Fee	0.50%	6,862	20,587

RENT FREE COSTS

Unit 7	12 mths	26,640	
Unit 8	12 mths	36,000	
Unit 9	12 mths	30,600	
Unit 10	12 mths	30,600	123,840

FINANCE

Debit Rate 7.000% Credit Rate 0.000% (Nominal)	
Land	22,787
Construction	26,300

Ulverston**Masterplan B1 Development - Plot 2**

Total Finance Cost 49,087

TOTAL COSTS 1,193,424

PROFIT 179,014

Performance Measures

Profit on Cost%	15.00%
Profit on GDV%	12.29%
Profit on NDV%	13.04%
Development Yield% (on Rent)	10.38%
Equivalent Yield% (Nominal)	8.50%
Equivalent Yield% (True)	8.97%

IRR 28.39%

Rent Cover	1 yr 5 mths
Profit Erosion (finance rate 7.000%)	2 yrs

APPENDIX 6.3 MASTERPLAN B1 DEVELOPMENT APPRAISAL – PLOT 3

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Development Appraisal

Ulverston

Masterplan B1 Development - Plot 3

Report Date: 12 April 2012

APPRAISAL SUMMARY**LICENSED COPY****Ulverston****Masterplan B1 Development - Plot 3****Summary Appraisal for Phase 1****REVENUE****Rental Area Summary**

	Units	ft ²	Rate ft ²	Initial MRV/Unit	Net Rent at Sale	Initial MRV
Unit 4	1	3,700	£8.00	£29,600	29,600	29,600

Investment Valuation**Unit 4**

Market Rent	29,600	YP @	8.5000%	11.7647	348,235	
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GROSS DEVELOPMENT VALUE

Purchaser's Costs	5.80%	(20,198)		348,235		
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NET DEVELOPMENT VALUE328,038**NET REALISATION****328,038****OUTLAY****ACQUISITION COSTS**

Residualised Price (0.48 Acres £26,569.82 pAcre)			12,754			
Agent Fee		1.00%	128			
Legal Fee		0.50%	64			
				12,945		

CONSTRUCTION COSTS

Construction	ft ²	Rate ft ²	Cost			
Unit 4	4,500	£41.50	186,750	186,750		
Contingency		5.00%	9,338		9,338	

PROFESSIONAL FEES

Construction Professional Fees	15.00%	28,013		28,013		
--------------------------------	--------	--------	--	--------	--	--

MARKETING & LETTING

Letting Agent Fee	10.00%	2,960				
Letting Legal Fee	5.00%	1,480			4,440	

DISPOSAL FEES

Sales Agent Fee	1.00%	3,280				
Sales Legal Fee	0.50%	1,640			4,921	

RENT FREE COSTS

Unit 4	12 mths	29,600		29,600		
--------	---------	--------	--	--------	--	--

FINANCE

Debit Rate 7.000% Credit Rate 0.000% (Nominal)						
Land			2,364			
Construction			6,881			
Total Finance Cost				9,245		

TOTAL COSTS**285,250****PROFIT****42,788****Performance Measures**

Profit on Cost%	15.00%		
Profit on GDV%	12.29%		
Profit on NDV%	13.04%		
Development Yield% (on Rent)	10.38%		
Equivalent Yield% (Nominal)	8.50%		
Equivalent Yield% (True)	8.97%		
IRR	34.54%		
Rent Cover	1 yr 5 mths		

Ulverston

Masterplan B1 Development - Plot 3

Profit Erosion (finance rate 7.000%)

2 yrs

APPENDIX 6.4 MASTERPLAN B1 DEVELOPMENT APPRAISAL – PLOT 4

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Development Appraisal

Ulverston

Masterplan B1 Development - Plot 4

Report Date: 12 April 2012

APPRAISAL SUMMARY**LICENSED COPY****Ulverston
Masterplan B1 Development - Plot 4****Summary Appraisal for Phase 1****REVENUE****Rental Area Summary**

	Units	ft ²	Rate ft ²	Initial MRV/Unit	Net Rent at Sale	Initial MRV
Unit 1	1	4,500	£8.00	£36,000	36,000	36,000
Unit 2	1	4,500	£8.00	£36,000	36,000	36,000
Unit 3	1	4,320	£8.00	£34,560	34,560	34,560
Totals	3	13,320			106,560	106,560

Investment Valuation

Unit 1					
Market Rent	36,000	YP @ 8.5000%	11.7647	423,529	
Unit 2					
Market Rent	36,000	YP @ 8.5000%	11.7647	423,529	
Unit 3					
Market Rent	34,560	YP @ 8.5000%	11.7647	406,588	
				1,253,647	

GROSS DEVELOPMENT VALUE

Purchaser's Costs	5.80%	(72,712)	1,253,647
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NET DEVELOPMENT VALUE1,180,936**NET REALISATION****1,180,936****OUTLAY****ACQUISITION COSTS**

Residualised Price (1.37 Acres £111,414.12 pAcre)		152,637	
Agent Fee	1.00%	1,526	
Legal Fee	0.50%	763	
			154,927

CONSTRUCTION COSTS

Construction	ft ²	Rate ft ²	Cost	
Unit 1	5,000	£41.50	207,500	
Unit 2	4,500	£41.50	186,750	
Unit 3	4,800	£41.50	199,200	
Totals	14,300		593,450	593,450

Contingency	5.00%	29,673	29,673
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PROFESSIONAL FEES

Construction Professional Fees	10.00%	59,345	59,345
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MARKETING & LETTING

Letting Agent Fee	10.00%	10,656	
Letting Legal Fee	5.00%	5,328	
			15,984

DISPOSAL FEES

Sales Agent Fee	1.00%	11,809	
Sales Legal Fee	0.50%	5,905	
			17,714

RENT FREE COSTS

Unit 1	12 mths	36,000	
Unit 2	12 mths	36,000	
Unit 3	12 mths	34,560	
			106,560

FINANCE

Debit Rate 7.000% Credit Rate 0.000% (Nominal)			
Land		28,294	
Construction		20,954	
Total Finance Cost			49,248

TOTAL COSTS**1,026,900****PROFIT**

Ulverston**Masterplan B1 Development - Plot 4****154,035****Performance Measures**

Profit on Cost%	15.00%
Profit on GDV%	12.29%
Profit on NDV%	13.04%
Development Yield% (on Rent)	10.38%
Equivalent Yield% (Nominal)	8.50%
Equivalent Yield% (True)	8.97%
IRR	25.35%
Rent Cover	1 yr 5 mths
Profit Erosion (finance rate 7.000%)	2 yrs