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The commission was divided into two phases, with phase 1 culminating in a final report issued in December 2008 that established the current physical and environmental situation on the Lillyhall Estate. The table on page 8 identifies the key strengths, weaknesses, opportunities and threats highlighted by the Phase 1 Report.

Figure ES 2 opposite illustrates a 3D model of the existing Lillyhall Estate.

This phase 2 report is the culmination of an intense period of consultation with the project Steering Group and stakeholders. It sets out the proposed vision, branding and masterplan for Lillyhall.

Vision

The Vision for the future of Lillyhall has been informed by the objectives identified by the NWDA and wider Steering Group into the following statement:

‘Lillyhall will make a strategic contribution to employment in West Cumbria with an emphasis on integration between industry, commerce, education and training, featuring high quality design in an attractive landscape. Lillyhall aspires to be a nationally recognised centre for the application of knowledge, skills and technology in responding to the challenges of sustainable energy production and low carbon solutions.’
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Employment is an essential part of the Masterplan and the aspiration is that this should be achieved using the latest sustainable technologies, particularly as part of the wider contribution towards ‘Britain’s Energy Coast™ Masterplan’.

The Energy Coast™ Masterplan identifies that West Cumbria has “major nuclear assets and internationally competitive expertise and skills in a range of related activities, including environmental remediation, engineering and decommissioning. Employment in research and development is double the regional average.” An important objective of this approach is that by 2027, West Cumbria will be a globally recognised nuclear, energy, environment and related technology business cluster, with a strong, diversified and well connected economy with a highly-skilled population. The Energy Coast™ Masterplan also draws on the area’s natural environment, ensuring that any negative aspects of its location are overcome and its benefits are maximised.

This Masterplan for Lillyhall aims to contribute significantly to the achievement of these objectives.
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<th>OPPORTUNITIES</th>
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<td>The existing exceptional landscape and coastal views</td>
<td>Existing buildings have little architectural merit</td>
<td>Well connected to M6 and west coast main rail line by A66 trunk road</td>
<td>Perceived isolation</td>
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<td>Significant public sector land ownership</td>
<td>Analysis of educational trends shows attainment generally below national average</td>
<td>Proximity to Workington and Whitehaven</td>
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<td>Levels of young people leaving education at 16 years old are higher than the national averages</td>
<td>Planning policy broadly supportive of employment-based development</td>
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<td>The presence of significant vacant sites</td>
<td>Skills shortage that is, to some extent, caused by an ageing population</td>
<td>Investment in education (e.g. Energus, Lakes College)</td>
<td>GVA in Cumbria has increased since 2000, but declined in relative terms when compared with the UK</td>
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<td>Good strategic transport network</td>
<td>The ‘brain drain’ – loss of academic talent to areas of ‘greater opportunity’</td>
<td>Strategic priority in Britain’s ‘Energy Coast’ Masterplan</td>
<td>Strong dependence on the manufacturing sector in West Cumbria</td>
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<td>Proximity to local towns</td>
<td>Numerous land / building ownerships without single clear management</td>
<td>University of Cumbria facility</td>
<td>A high likelihood of a number of protected species and ecological constraints across the Estate</td>
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<td>Low crime levels in the area</td>
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<td>Existing developer interest (some advanced)</td>
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<td>Lack of services for workforce</td>
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- STRENGTHS: The existing exceptional landscape and coastal views, Significant public sector land ownership, NWDA presence on the Estate, The presence of significant vacant sites, Good strategic transport network, Proximity to local towns, Low crime levels in the area.

- WEAKNESSES: Existing buildings have little architectural merit, Analysis of educational trends shows attainment generally below national average, Levels of young people leaving education at 16 years old are higher than the national averages, Skills shortage that is, to some extent, caused by an ageing population, The ‘brain drain’ – loss of academic talent to areas of ‘greater opportunity’, Numerous land / building ownerships without single clear management, No clear branding of the Estate, Lack of services for workforce.

- OPPORTUNITIES: Well connected to M6 and west coast main rail line by A66 trunk road, Proximity to Workington and Whitehaven, Planning policy broadly supportive of employment-based development, Investment in education (e.g. Energus, Lakes College), Strategic priority in Britain’s ‘Energy Coast’ Masterplan, University of Cumbria facility, Existing developer interest (some advanced), Low land values, European funding available, Use of renewable energies.

- THREATS: Perceived isolation, Competition from other nearby locations, Global economic recession, GVA in Cumbria has increased since 2000, but declined in relative terms when compared with the UK, Strong dependence on the manufacturing sector in West Cumbria, A high likelihood of a number of protected species and ecological constraints across the Estate, Limited capacity of existing utilities network.
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Branding

It is important to define a strong identity for Lillyhall which gives it a recognisable profile, both at a local and wider level. As perceptions of Lillyhall begin to evolve, investment which will contribute to this identity will be encouraged reinforcing the long-term Vision.

In order to establish the identity, it is essential to define a ‘brand’ that builds upon Lillyhall’s existing strengths as an established employment destination with existing strong linkages to the wider region. In terms of marketing Lillyhall to prospective businesses, these strengths should be clearly stated.

The proposed brand for Lillyhall has been developed as two complementary components of ‘name’ and ‘strapline’. The name ‘Lillyhall’ will be maintained as an essential definition of location within West Cumbria and reinforced through the simplified wayfinding diagram illustrated in figure ES 3.

The logo and strapline illustrated opposite have been designed specifically for Lillyhall and are used throughout the masterplan report. Graphically, the shapes in the logo represent the three key elements and point towards Lillyhall as being a catalyst for their further development. The colours are inspired by Lillyhall’s position within the surrounding area – green for the countryside and blue for the sea.

Having two strong colours helps to define a uniform brand. The font used is clean with a bold style, suggesting Lillyhall’s strong position within the area and importance to the Energy Coast Masterplan. The words used in the strapline incorporate the following brand values:

- **Energy**: reflects the important contribution Lillyhall can make towards achieving the vision of Britain’s Energy Coast Masterplan, and is one of the proposed primary land uses for Lillyhall. It also reflects the Energy of the place itself and what it offers;
- **Delivery**: reflects two elements – delivery of the Masterplan and delivery of development. One of the key aims of both the Lillyhall Masterplan and the Energy Coast Masterplan is delivery, and there are a number of key bodies that can assist, not least the NWDA; and
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- **Space**: reflects the fact that there is space within Lillyhall to develop, and that new floorspace will be created to accommodate new and existing occupiers. It also reflects the feeling of space generated by the open setting and surroundings of Lillyhall.

The brand and associated logo, font and colours should be used on all future documentation, marketing material, websites, signage etc. This will help define the brand and make it identifiable – to local communities, investors, developers, occupiers and Councils.

The Masterplan Strategy

Figure ES 5 opposite illustrates the Masterplan Strategy – the agreed approach as identified through an iterative options process that has evolved through presentation and feedback from the project Steering Group and major stakeholders.

The broad land use configuration illustrated in the Masterplan Strategy diagram responds directly to the NWDA/Steering Group objectives, physical, environmental and property market drivers as well as the aspirations defined in the Vision. The most influential drivers have been as follows:

- Current known development proposals and enquiries;
- The importance of a range of floorspace, allowing for start-up businesses in managed workspace and workshops;
- The demand for expansion opportunities from existing tenants and occupiers;
- Large floorspace requirements;
- The ability to develop speculatively in early phases of the Masterplan;
- The need to contribute towards Britain’s Energy Coast Masterplan;
- Improving educational requirements, responding to the needs of educational establishments and the “knowledge gap” that exists in the wider region;
- Improving the presentation and image of Lillyhall; and
- The conclusions emerging from DTZ’s West Cumbria Employment Land Study, December 2008, as follows:
  - To resist residential uses;
  - Integration with existing adjacent employment uses through refurbishment and redevelopment (in particular Alcan);
  - Clearly differentiate between the roles of Lillyhall and Westlakes Science and Technology Park to avoid potentially competing for prospective occupiers;
  - Lillyhall is best placed to cater for a broader mix of employment uses and occupiers that require larger format premises. Westlakes Science and Technology Park should continue to be the focus for knowledge-based industries (especially those related to the nuclear sector); and
  - Defining Lillyhall as the location for skills development and Westlakes Science and Technology Park as the location for research activity.

Figure ES 5: Masterplan Strategy
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The focal point within the Masterplan is an area defined as the ‘Local Hub’. This is envisaged as the future nucleus of interaction within Lillyhall, maximising the benefits of its central location and its proximity to the education facilities. Whilst its focus is serving local workers and residents, it will also benefit from passing traffic on the junction of the A595 and A596.

The adjacent Lillyhall West area takes energy as the defining application, building upon the important role of the recently opened Energus Centre. A centre for excellence in education and environmental industries. Energus will be reinforced through the University of Cumbria’s plans to develop a CERESE (Centre for Excellence in Renewable and Sustainable Engineering) in an adjacent area. The Masterplan embraces these and other contributory businesses in Lillyhall West, but also anticipates an enhanced environment through provision of a substantial central park area that will create a setting for new employment buildings, evoke a sense of place and link to a series of green routes that contribute to Lillyhall’s overall sustainability credentials.

Lillyhall North has a primary purpose of employment and office development, together with a range of employment-based land uses. These proposed uses broadly reflect known developer interest, in particular east of the A595.

The area defined as Lillyhall East presently incorporates a number of established businesses. The Masterplan proposes where possible to work with these businesses with an enhanced environment achieved through smaller-scale infill development, guidance for longer-term redevelopment as buildings reach the end of their useful life and environmental upgrades in particular through the introduction of green routes.

Lillyhall South includes two distinct primary uses of education and renewables (technology and delivery). The proposals have been developed in close consultation with Lakes College and allow for short and longer term education expansion requirements. The renewables area is located on the Alcan site and takes account of existing developer and business interest in renewable industry and green waste. The area immediately adjacent to the A595 is seen as an important interface to adjacent education uses with associated synergies in development of renewable research and delivery. As a spin off to this research there may also be the opportunity to introduce a Lillyhall Combined Heat and Power (CHP) facility at this point, albeit it is recognised that the viability and deliverability of such a system would be subject to further detailed investigations. Consistent with other areas of the Masterplan improvements to the green network, existing wildlife habitats and linkages to the wider natural environment will also form an important part of Lillyhall South.
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The Masterplan

The physical Masterplan that has been derived from the Masterplan strategy is shown in figure ES 6 on page 11. The plan illustrates a potential building and open space layout that would deliver the strategy and vision, with associated text providing the detail in relation to the different areas and the principles that should be applied in encouraging high standards of design.

Physical Proposals

The Lillyhall Masterplan has been primarily developed to provide strategic guidance in relation to delivery of a wide range of sites. It does not set out to frustrate development or define architectural aesthetics in detail. Nevertheless, a three dimensional study has been produced that does provide the opportunity to explore and illustrate these principles. The masterplan provides a summary of the potential approaches that could be taken to respond to the strategic guidance, with associated illustrations.

Figure ES 7: The Local Hub looking west from the A595/A596 roundabout.
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The Local Hub

The Local Hub is seen as providing a sense of place within Lillyhall. New uses and open spaces have been created to respond to local interaction with an emphasis on providing facilities and services that can be used throughout the working day for the benefit of the Lillyhall area. Uses provided within the Local Hub will therefore include a small parade of retail units with office space over providing the potential for professional services and other small businesses requiring locally accessible space. Alongside the retail provision will be space for future development of a small community facility / crèche and gym. These two elements have been provided to respond directly to the latent demand from the increased number of people that will inhabit the business, employment and education areas of Lillyhall. The location of the Local Hub with good access to the walking/cycle and road networks is therefore crucial in relation to activity patterns during the working day. Buildings are envisaged as two and three storey, providing the appropriate level of enclosure and physical presence (see figure ES7).

The Local Hub is also seen as the interface between energy, education and renewables thereby potentially providing the opportunity for interaction between different businesses; for instance an informal meeting in the café bar located in the retail parade. Consequently, proposals for student accommodation, managed workspace and further office provision have all been positioned around the Local Hub to take full advantage of the facilities and provide the greatest opportunity for interaction.

A further advantage of the Local Hub position is the ability to define the physical heart of Lillyhall. It is proposed that this could be further reinforced by the creation of a sculptural bridge structure acting as a local landmark crossing the A595 (see figure ES8). The bridge is seen as a pedestrian/cycle facility that will be an important component of the network of routes forming the “green loop” around the whole of Lillyhall. The bridge also connects directly into a park and recreational area to the north east to the Local Hub, which will be a further important amenity that this area can offer to the whole Lillyhall community.

Figure ES 8: The landmark bridge crossing the A595.
Lillyhall Masterplan

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Lillyhall West

Lillyhall West essentially divides into two distinct areas either side of Blackwood Road. The area to the west includes a series of existing businesses including Energus, Cumberland Pencil Factory and HM Revenue and Customs. New buildings in this area are seen as primarily energy and business focused with an emphasis on delivery of the technology and support associated with the environmental industries. Two and three storey buildings have been located to define principal routes and wherever possible maintain long distance views north west to the coast.

The area to the east of Blackwood Road also presently includes a series of businesses, including a number of car dealerships and the Stagecoach Bus Depot. The main difficulty with the present building form is the absence of definition to the A595 as a principal corridor passing through Lillyhall. The Masterplan proposes to address this issue by locating new buildings along the edge of the A595 with access generally achieved from the rear. The majority of new buildings will be two storeys with three storey elements used to provide corner articulation and gateway emphasis. This overall long term aspiration is identified in the Masterplan however it is recognised that an incremental approach is required for this area. In this respect buildings and sites will be upgraded and modified in accordance with principles set out in the Masterplan document as and when sites become available. This approach would also apply to the central park area, located to the rear, where the significant open space provision has been developed as a direct response to a large working population associated with a fully executed Lillyhall Masterplan. Clearly it is only sensible to develop such an amenity as and when the demand requires. Equally if provision of new employment space alongside Blackwood Road is seen as desirable this should not be discouraged providing the principles of amenity/setting and green linkage are not lost.

Figure ES 9: Potential employment building alongside the A595.
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Lillyhall North

The A595 splits the Lillyhall North area into two separate parcels. The area to the west is presently occupied by the Eddie Stobart Limited depot that tends to dominate views on approach from the north. In the fullness of time this area is seen as a primary location for B2/B8 type employment accommodation, supplemented by further B1 type employment on the north west perimeter, positioned to make the most of the aspect overlooking open countryside.

The area to the east of the A595 forms a principal gateway to Lillyhall and has the potential for high profile uses that are best placed to take advantage of the A595 frontage. The relationship with the roundabout which links to Workington, further reinforces this site as a location for gateway uses. In response the Masterplan proposes a new hotel, petrol filling station and a parade of car dealerships together with a range of office and employment units and supporting open space provision. Buildings will be a maximum of two storeys with the hotel extending to three storeys should the need be identified (see figure ES 10). To the east of Lillyhall North, a zone for habitat retention has been included as specific mitigation to ecology issues identified in the Phase 1 studies.

Figure ES 10: View of Lillyhall North
Lillyhall East

Numerous existing businesses presently operate from the Lillyhall East area. The Masterplan proposes to work with these businesses infilling and repairing frontages over an extended period as and when sites become available. The Masterplan has initially identified zones alongside Joseph Noble Road, the A595 and Pittwood Road as areas for intervention. This will comprise B2 type employment accommodation very much in accordance with the existing provision in Lillyhall East. The building intervention will be complemented by a public realm and signage upgrade that once again links with the wider green network aspiration. The primary frontage to the A595 is also upgraded with new landscape treatment introduced to improve the appearance and disguise some of the more utilitarian buildings (see figure ES 11).

Figure ES 11: View of Lillyhall East
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Lillyhall South

Education, car showrooms and employment are the dominant uses within the Lillyhall South area. As with other areas the A595 splits the area into two distinct parcels. It is the intention of the Masterplan to retain as much of the existing uses as possible with the Masterplan providing the opportunity to link future uses through a shared approach to issues such as the delivery of environmental technology.

Major intervention west of the A595 focuses upon Lakes College with proposals to develop a new education building alongside the road. The new building will provide a high profile visible frontage for Lillyhall. New College workshop buildings will be developed alongside Hallwood Road with the benefit of improving the outlook, natural surveillance and levels of activity on this route that will become one of the new linkages from the College to the Local Hub area. New buildings will be a maximum of two storeys in scale, in line with the existing provision on the College Campus.

The area to the east of the A595 is presently dominated by large format industrial buildings that are a legacy of the Alcan site. Where possible it is envisaged that these buildings will be re-used and upgraded with new architectural treatment reflecting the importance of the A595 frontage. This new frontage will be formed from three elements collectively providing the renewable energy offer for Lillyhall. The original Alcan reception building will be refurbished as the ‘campus’ welcome building. The large format building adjacent will be upgraded and provide the manufacturing facilities. This will be complemented by a new curved building that will provide a showcase for knowledge transfer facilities. This could include research, seminar/conference and exhibition space very much complimenting the proposals that are being developed for the Lakes College site. This new frontage of buildings will also function as a screen to green uses behind, that could include household waste recycling and waste to energy facilities as part of the Lillyhall CHP initiative as described previously (see figure ES 12).

Figure ES 12: View of Lillyhall South
Executive Summary

Phasing Strategy

The level of ambition that is envisaged for Lillyhall will take time to deliver. A phased approach to development over a 20 year timeframe has been considered in order to understand how the individual components will contribute to the overall strategic objectives.

The phasing plan illustrated in figure ES 13 provides a strategy that reflects the balance between the delivery of important elements of the Masterplan with aspects such as land / property availability (e.g. the possibility of bringing the Local Hub forward early in the Masterplan, subject to positive negotiations to acquire the land), building quality (e.g. when buildings reach the end of their useful life), known and projected developer and occupier demands and forecasts (e.g. managed workspace and educational facilities) and current commitments. Clearly phasing is time sensitive; therefore as new initiatives / development and funding opportunities come forward, it should be reviewed in order to ensure the wider objectives are being achieved. The phasing strategy provided in this masterplan report should be viewed as a guide rather than a set of inflexible restrictions.

The phasing strategy considers broad time periods of 5 year increments however it is likely that there will be a ‘blurring of edges’ between different periods and the potential for overlap where there is interaction between adjacent uses. The major elements in each time period are as follows:

0 to 5 Years

Developments that have achieved a certain level of momentum or have been progressed to a relatively detailed level, such as a planning application submission, have been included in this period. Within this category are educational development and managed workspace in Lillyhall South and start of development at Lillyhall North. It also assumes that certain elements of the Local Hub and other energy / office opportunities within Lillyhall West will come forward in this period. This assumption is based upon existing interest in a number of the proposed business uses within the Local Hub (small café/sandwich outlet) and potential public sector forward funding for office development. However, all of the commercial aspects of the Local Hub will be demand driven and subject to individual viability studies. Investment in infrastructure and improved public transport will be undertaken in this first period. These important ‘early win’ projects will be on the whole public sector led and are a critical example of where the new Lillyhall brand, Energy, Delivery, Space can be reinforced.
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5 to 10 Years

The second phase of development incorporates sites where interest is understood to be strong or where the public sector are able to influence the initial pump priming of investment. This includes areas such as the student accommodation in Lillyhall South, office/energy projects in Lillyhall West, employment and public realm upgrades in Lillyhall West and reconfiguration of the Alcan site.

Highway infrastructure works in areas identified in orange on figure ES 13 will be necessary in the 5 to 15 year period. This work will be capacity and demand driven, very much dependant on the level and type of accommodation proposed on the various development sites. The exact phasing period has consequently been left broad in order to respond to these issues.

10 to 15 Years

Further infill employment development in Lillyhall East has been identified as coming forward in the third phasing period. By this stage it is believed that the Masterplan will be maturing and energy/office development and associated uses in the wider area will be generating the need for further employment space.

15 to 20 Years

Development identified within the final phase mainly consists of sites where complex land acquisition exists or an established business is in place that has no immediate requirement to move. This includes energy/office development on the A595 corridor, redevelopment of the Lillyhall North site presently occupied by Eddie Stobart Ltd and the renewables interpretation facilities building in Lillyhall South.

Delivery and Funding Key Recommendations

A series of delivery and funding routes were considered as part of the masterplan for Lillyhall. Key recommendations emerging from this process are summarised below.

Delivery of the Masterplan Vision

The majority of the main initiatives carried out at Lillyhall in the last decade have been led by the Lillyhall Partnership (a partnership by agreement of NWDA, CCC WCDF and WCDA).

Going forward it is likely that a combination of the following options would provide the most flexible way of securing the benefits of the Masterplan vision:

• Strategic Development Partnership (SDP) between key landowners and stakeholders that could in conjunction with, or amalgamation with, the Lillyhall Partnership assist delivery of the Masterplan.
• Planning Led Approach - which relies upon subsequent adoption of the Masterplan proposals as planning policy through the LDF process and the buy-in and co-operation of the key landowner’s to the Masterplan vision.

As Britain’s Energy Coast West Cumbria (BECWC) are currently leading on implementation of Britain’s Energy Coast™ Masterplan we feel that this organisation is best placed to promote and lead on delivery of the Lillyhall Masterplan Vision and formation of the SDP. It will be necessary to employ suitable resources to ensure delivery and we believe that this should be led by a Project Manager within BECWC and whose role and responsibilities would include:

• Overall leadership and preparation of a business plan for implementation and delivery of the Masterplan;
• Reporting to Strategic Development Partnership Board outlined previously;
• Programme management, planning and project delivery;
• Corporate governance;
• Co-ordination and management of public sector inputs and private sector inputs required to deliver Masterplan improvements;
• Leading discussions and establishing relationships with private sector developers, existing businesses and inward investors;
• Promoting the Lillyhall vision through PR, marketing and branding initiatives;
• Supporting and contributing towards delivery of the Energy Coast™ Masterplan;
• Adopting appropriate structures/procedures to ensure that NWDA land assets can be made available for new development i.e. marketing, option agreements, development agreement;
• Securing funding approvals and controlling budgets from public sector partners to deliver proposed improvements; and
• Leading on procurement, including the appointment of consultants and contractors adhering to OJEU procurement and adopted corporate governance procedures and requirements.

It is imperative that all of the key landowners and stakeholders collaborate to promote the benefits of delivering the Masterplan Vision to the other land and property owners. A unified approach by Cumbria Development Agencies would demonstrate substantial commitment to the delivery of improvements at Lillyhall, which could be used to influence and persuade other land owners and business occupiers of the wider benefits of delivering the Masterplan.
Options for NWDA owned land disposal

An approach that follows the tried and tested model, whereby NWDA procures development partners on a plot by plot basis via individual development agreements with the private sector, or by undertaking direct development in conjunction with other public sector partners would be the most advantageous delivery model. This approach would also accord with NWDA being part of the Strategic Development Partnership in relation to delivery of the Masterplan Vision. NWDA land ownership will be a primary component of the SDP asset strength.

In the short term and given the current economic climate and property market conditions, we anticipate that the public sector will have to continue to invest directly in bringing forward development at Lillyhall on NWDA owned land.

Private sector interest has previously been shown in the opportunities available at Lillyhall, to deliver a range of office, light industrial, and mixed use development. Whilst the market has declined since a number of these proposals were received, it does highlight that Lillyhall is an attractive location to potential developers, and it is likely that this interest will be renewed once the macro economy and property market improves.

Capitalising upon this interest in the medium term with the benefit of an adopted masterplan framework will achieve many of the objectives sought by the stakeholder group, delivering high quality, speculative and bespoke business accommodation. Reliance upon “gap” funding is likely to prevail in the short / medium term given the relative low rental and capital values in West Cumbria.

Lillyhall Management and Marketing

Management

Future funding of estate management in the short to medium term is likely to be undertaken by NWDA and the Lillyhall Partnership given the lack of any formal agreement (other than existing leases with service charge elements) with the wider Lillyhall business community.

A longer term intention of setting up a Business Improvement District would in our opinion provide the best opportunity of achieving across the board funding of estate management for Lillyhall as a levy upon business rates would be mandatory. We do not believe that the setting up of an Estate Management Company, which would be reliant upon the buy in of all business occupiers, is practical and freeloaders is likely to occur as many occupiers decide that they do not wish to join the company, which would make it inequitable upon those that do see the benefits.

Marketing

The marketing of the Lillyhall brand to promote the benefits of the location, businesses located there and the availability of land and premises should, in the consultant’s opinion, be undertaken by the delivery vehicle chosen to deliver the Masterplan proposals. In this regard the SDP or the Lillyhall Partnership, supported by West Cumbria Vision, would be the most appropriate organisation to take on the responsibility of the marketing of Lillyhall.

Marketing of Lillyhall would require the preparation of a detailed costed marketing strategy to be implemented over say a three year period. The strategy would confirm responsibility for the delivery marketing, how it is going to be delivered, what it will cost, and how it will be funded.

The preparation of a brief to secure proposals from appropriate marketing organisations to prepare a marketing strategy for Lillyhall, should form part of the business plan for the delivery of the Lillyhall Masterplan.

Potential funding opportunities

It is likely that the principal sources of funding to implement delivery of the Masterplan will come from NWDA / BECWC and ERDF, however other funding opportunities should be fully investigated (once a detailed business plan has been formulated) through such organisations and funds as JESSICA Urban Development Fund, Sellafielde Socio - Economic Development Plan, West Cumbria Development Fund, Cumbria County Council and Homes and Communities Agency. In addition, the Lillyhall Partnership still has some funds to undertake works and projects at Lillyhall.
Executive Summary

Masterplan Early Wins

In terms of ‘early wins’, the Masterplan recommends that investment in infrastructure and public transport is made and a programme of public realm works along the A595 and at key gateways is implemented. These measures will help to create a step change in the physical environment that will set a qualitative threshold to attract private sector developers.

Lakes College is progressing development proposals for a new construction centre. This must integrate with the offer at Energus and the University of Cumbria’s plans to develop a CERESE (Centre for Excellence in Renewable and Sustainable Engineering) adjacent to Energus. Coordination between these projects alongside the Local Hub and student accommodation is critical to the realisation of this masterplan.

It is also understood that private developer proposals for a mixed use scheme at Lillyhall North are due to come forward in the near future.

The Lillyhall Partnership intends to progress with proposals for the development of managed workspace which will also be an important early project.

Next Steps

Key next steps therefore will include the following:

- Formation of a detailed business plan;
- Preparation of a detailed costed marketing strategy to be implemented over say a three year period;
- Development Briefs for key sites; and
- The further development of Britain’s Energy Coast West Cumbria as the key organisation responsibility for leading on and co-ordinating delivery.

Conclusion

Over and above the steps set out above, it is important to appreciate that the Masterplan is a flexible blueprint for the future. It is prescriptive in certain areas but also recognises that within a 20 year timeframe, there will inevitably be external influences that are not known at this time which will have a significant impact on the final form of the physical place.

Nevertheless, it is extremely important that the fundamental positive attributes of this Masterplan in terms of the creation of an environment that will help deliver Britain’s Energy Coast™ Masterplan, as well as providing significant employment and education opportunities, can and should be achieved at Lillyhall.
1.0 Introduction
1.0 Introduction

1.1. Taylor Young, supported by WYG Group, King Sturge and Mace, was appointed by the Northwest Regional Development Agency (NWDA) to produce a Strategic Masterplan for the Lillyhall Estate near Workington, Cumbria (see figure 1.1).

1.2. The Masterplan was commissioned to provide a strategic guide to future development whilst promoting investment into the Lillyhall Estate. It is considered that this work will result in a framework to steer development over the next 20 years.

1.3. This report forms Phase 2 of the overall commission and is supported by a Phase 1 Report and a Design Prospectus. The Phase 1 Report comprises a robust evidence base which informs the Masterplan, including comprehensive spatial and desktop analysis and property market review. The Phase 1 Report itself should be treated as a Technical Appendix to this report. The Design Prospectus is a standalone document that contains design guidance for the development of Lillyhall and it should also be treated as a Technical Appendix to this report.

1.4. The commission has been directed by a Steering Group which comprises NWDA, Cumbria County Council (CCC), Allerdale Borough Council (ABC), Copeland Borough Council (CBC), Energy Coast Campus / University of Cumbria, West Lakes Renaissance (WLR) and Cumbria Vision.

1.5. Located just over 5 km (3 miles) to the east of central Workington and 9 km (5 miles) to the north of central Whitehaven, the Lillyhall Estate extends over 160 hectares and is currently occupied by a wide range of land uses. Established in the early 1960s, the uses on the site currently range from large distribution warehouses to small industrial units, whilst also encompassing a variety of office, car showroom and education uses.

1.6. The location of Lillyhall benefits from a unique rural setting, offering spectacular views across the Solway Firth towards Scotland to the north west and the Lake District mountains to the east. It is well located on the local highway network, served by both the A595 trunk road and the A596 main road, with access to the M6 motorway via the A66 trunk road. The nearest railway stations are located in Workington and Harrington, with access to the West Coast Mainline via connections at Carlisle.

1.7. A number of public sector organisations have historically and are presently involved in the management of Lillyhall. Their role is summarised below.

1.8. The Lillyhall Partnership was set up in 1999, comprising the NWDA, CCC and the West Cumbria Development Fund (WCDF). This is a partnership by agreement and now also includes West Cumbria Development Agency (WCDA). The Partnership has already invested £5m into the Lillyhall Estate including landscape and infrastructure works, public artwork, installation of broadband, security measures and the development of Lillyhall Business Centre and West Cumbria House. The Partnership continues to oversee the landscape maintenance on the main roads within the Estate and holds a small fund of money for projects on the Estate.

1.9. The Lillyhall Estate falls within the West Lakes Renaissance Urban Regeneration Company (URC) area. This URC was established in 2003 with the aim of delivering £200m worth of investment in a ten-year period. This catalytic investment is aimed at leveraging private sector investment into West Cumbria to bring about wide-scale regeneration. Whilst the area retains its URC status, the bulk of WLR funds have now been divided between two new boards, Barrow Vision and Britain’s Energy Coast West Cumbria (BECWC). It is now BECWC’s task to drive forward economic regeneration in West Cumbria.

1.10. Development land ownership within the Lillyhall area is now largely consolidated in NWDA. NWDA has designated Lillyhall as one of two strategic sites (for investment) in West Cumbria - the other being West Lakes Science Park (WLSP). Achieving synergy and complementarily with the development of WLSP is a key driver of the masterplan.

1.11. In terms of local government, the study area falls entirely within Allerdale Borough. However, the boundary with Copeland Borough adjoins the south of the Estate.

1.12. Taking a broader perspective, the West Cumbria area has historically suffered greatly owing to geographical isolation coupled with steady industrial decline. A coordinated, multi-agency approach is now underway to bring about the renaissance of the wider area, including the Lillyhall Estate.

1.13. The thorough understanding of the physical, social and environmental aspects of Lillyhall, gained through the Phase 1 research and applied during Phase 2 of the commission, has enabled the consultant team, in partnership with the client Steering Group, to develop a Masterplan that is ambitious but deliverable over the next 20 years.
Key Drivers

1.14. Phase 1 of this study, culminating in a final report issued in December 2008, revealed the current physical and environmental situation on the Lillyhall Estate. The table on page 26 identifies the key strengths, weaknesses, opportunities and threats highlighted by the Phase 1 Report. These key drivers underpin the Masterplan and have been the most dominant considerations through its evolution.

1.15. A number of issues are clearly specific to the Estate itself (such as ownership issues), whereas others are more sub-regional issues that impact upon the future success of Lillyhall (such as educational achievement).
### STRENGTHS
- The existing exceptional landscape and coastal views
- Significant public sector land ownership
- NWDA presence on the Estate
- The presence of significant vacant sites
- Good strategic transport network
- Proximity to local towns
- Low crime levels in the area

### WEAKNESSES
- Existing buildings have little architectural merit
- Analysis of educational trends shows attainment generally below national average
- Levels of young people leaving education at 16 years old are higher than the national averages
- Skills shortage that is, to some extent, caused by an ageing population
- The ‘brain drain’ – loss of academic talent to areas of ‘greater opportunity’
- Numerous land / building ownerships without single clear management
- No clear branding of the Estate
- Lack of services for workforce

### OPPORTUNITIES
- Well connected to M6 and west coast main rail line by A66 trunk road
- Proximity to Workington and Whitehaven
- Planning policy broadly supportive of employment-based development
- Investment in education (e.g. Energus, Lakes College)
- Strategic priority in Britain’s ‘Energy Coast’ Masterplan
- University of Cumbria facility
- Existing developer interest (some advanced)
- Low land values
- European funding available
- Use of renewable energies

### THREATS
- Perceived isolation
- Competition from other nearby locations
- Global economic recession
- GVA in Cumbria has increased since 2000, but declined in relative terms when compared with the UK
- Strong dependence on the manufacturing sector in West Cumbria
- A high likelihood of a number of protected species and ecological constraints across the Estate
- Limited capacity of existing utilities network
2.0 Property Market Perspective
Introduction

2.1. The Phase 1 Report provided a review of the UK economy and a brief commentary on the regional and sub-regional property market. The proposals put forward in Phase 2 are underpinned by a more in-depth analysis of the sub-region and what this means for Lillyhall going forward. The following section therefore provides:

• an update on the current economic position to set a context for any early proposals; and
• a review of the recent DTZ West Cumbria Employment Land and Premises Study for ABC and CBC highlighting any conclusions or recommendations in respect of Lillyhall.

2.2. Appendix 1 provides an update on the design and property comments from the Phase 1 Report in relation to 5 key known proposed developments on the Estate with deliverability and cost commentary. The following section, section 3, which sets out key property influences upon the Masterplan, should be considered in parallel with this section. Both sections were initially prepared in April 2009 and need to be read in the context of a changing economy, that may have moved on in certain sectors prior to the final publication of this report.

2.3. Key points that have informed the development of the Masterplan are shown in bold.

The Economy

2.4. Since the production of the Phase 1 Report in December 2008, UK economic conditions have worsened. The following is a brief update.

2.5. In March 2009, the Bank of England further cut the base rate following reductions in January and February to an all time low of 0.5%. The cuts in base rate are unlikely to be reflected in a corresponding fall in the cost of obtaining bank finance, but it is the lack of availability of credit, rather than the price, that is a major factor both for business generally and particularly for the property investment market. In parallel with the March reduction in base rates, the Bank of England embarked upon what is termed “quantitative easing”. Usually, central banks try to raise the amount of lending and activity in the economy indirectly, by cutting interest rates. Lower interest rates encourage people to spend, not save. But when interest rates can go no lower, the Bank’s only option is to pump money into the economy directly. That is termed quantitative easing. The way the central bank does this is by buying up assets - usually financial assets such as government and corporate bonds – using money it has simply printed.

2.6. The institutions selling those assets (either commercial banks or other financial businesses such as insurance companies) will then have “new” money in their accounts, which theoretically should boost the money supply. It is anticipated by the Bank of England that this will improve liquidity and encourage the commercial banks to start lending to business and individuals again. This is a radical step by the Bank of England but it is too early to say whether this strategy will ultimately succeed in freeing up the availability of credit that is so much needed to kick start the UK economy.

2.7. Until this liquidity improves, and hence the availability of bank finance improves, it is difficult to predict improvement in the liquidity of the property investment market.

2.8. Worries over a deepening of the recession and resultant potential business failures, and concerns over further upward movements in yields, are resulting in many potential purchasers endeavouring to reflect these factors in property pricing. However, many buyers who are not in a “must sell” situation have not reduced their expectations of value.

2.9. Overall, therefore, in a most sectors and geographical areas, there is only a modest level of trading activity leading to a low level of comparable transactions, and some of these are clouded by uncertainty as to whether the vendors are compelled to sell in a short timeframe due to their own liquidity problems. Market sentiment is generally accepting that there will be further falls in capital values before it will be safe to call the bottom of the market.

2.10. In terms of general trends in market activity, the following are particularly of relevance when considering the attractiveness to investors of any potential development at Lillyhall:

• Purchasers are less inclined to “take a view” on abnormal factors or uncertainties;
• Security of income, in terms of both lease length and covenant strength, are key considerations;
• Realistic/conservative reflection of voids and letting risks are factored into bid price; and
• Vacant rates liability.
Vacant Rates


2.12. At the time the legislation became live the implications of the credit crunch were becoming more apparent and the possibility of recession loomed large, which has subsequently been confirmed. In the context of the economic situation it seemed perverse to introduce legislation that would increase the tax burden on empty commercial property in the bizarre notion that this would stimulate the market and be good for business.

2.13. Government thinking for this legislation stems from the Lyons report, and the rationale behind it is that this will increase competitiveness by providing:

• A fiscal incentive for owners to let or develop empty property in order to reduce rates liability;
• Encouragement for the efficient use of empty land and property providing opportunities to bring brownfield sites back into use, and
• Incentives to owners to let or develop empty property – although the incentive is more of the stick variety rather than the carrot to which empty property has benefited from in the last two decades.

2.14. Given the current economic climate, the last thing that is needed when contemplating either holding onto empty property, or about to be vacated property is an increased tax burden. This is having a knock on effect on current and future commercial and industrial development and is impacting upon the transactional market and viability where the property markets are fragile. It has long been recognised that charging empty property rates serves no purpose where there is no market for a property.

2.15. Whilst there are initial exemption periods and options to mitigate liabilities, the only course of action that’s certain to resolve this issue is to demolish the building in question.

2.16. Despite the worsening economic climate, to date, the Government has not reconsidered this legislation, as the loss of an additional £1 billion per annum to the Exchequer makes it an unlikely prospect.

2.17. In the context of West Cumbria and Lillyhall, the commercial and industrial property market will be extremely susceptible to increases in costs of development and holding empty property. The additional burden of empty property rates will be a further disincentive to attracting private sector developers to build speculative commercial and industrial development in an area where the viability of new development is already questionable, without the availability of public sector financial support in the form of ‘gap’ funding.

2.18. Where existing buildings become available, such as the former Alcan premises at Lillyhall, potential purchasers are having to factor into their overall assessment of value, the impact that empty property rates will have on their holding costs, and this is being reflected in the strategy for the property going forward i.e. whether the existing buildings are lettable short term pending refurbishment / redevelopment taking place, or whether they should be demolished, and this is ultimately being reflected in the price they can afford to pay for property.

2.19. Property owner’s assessment of the value of their vacant property has to reflect these additional holding costs. In the current market where occupier demand is increasingly weak in most commercial sectors, many Landlords holding vacant property are prepared to reduce rentals and / or offer substantial incentives to attract occupiers to get the buildings occupied to negate the empty property rates liability.

Review of DTZ West Cumbria Employment Land & Premises Study

2.20. The most recent comprehensive study of supply and demand for employment land and premises within West Cumbria is contained within the West Cumbria Employment Land and Premises Study undertaken by DTZ (finalised October 2008) on behalf of Allerdale and Copeland Borough Councils.

2.21. This report provides an up-to-date assessment of the supply of and demand for employment sites in West Cumbria. This review will feed into the Local Development Framework and wider economic development planning. Its specific objectives are to:

• Assess the future demand and supply for employment land in the area;
• Assess the suitability of individual sites, existing, permitted and proposed, for employment uses;
• Identify sites which are unlikely to be required by the market or are unsustainable for employment development; and
• Develop appropriate further policy responses in the light of the supply and demand assessment.
Existing Supply

2.22. The Report identifies a clear hierarchy of sites in West Cumbria which are categorised as follows:

- Higher quality offices suited to local and inward investors are located at Westlakes Science and Technology Park, Dovenby Hall Estate and Lakeland Business Park. Lillyhall Business Centre provides good quality small-scale offices particularly attractive to younger companies;
- Mixed quality industrial / commercial premises can be found at Lillyhall which is West Cumbria’s major industrial location and is the preferred location for industrial inward investment;
- Local industrial occupiers are provided for at a range of locations, particularly Glasson in Maryport, Bridge End in Egremont, Sneckyate Road in Whitehaven, and Leconfield in Cleator Moor. However the quality in these locations is often poor;
- Low end uses are provided for at Glasson, Rise Howe, Derwent Howe and Lillyhall East; and
- In most rural areas, reasonable quality modern units can be found in Wigton in North Allerdale and Devonshire Road, Milom and Cross Lane, Seascale in the South of the area.

2.23. A number of key issues regarding current supply were identified:

- A lack of higher quality offices for general users (not nuclear), especially in Workington and Whitehaven Town Centres;
- An over-supply of poor quality, older industrial units throughout the area, and conversely a shortage of modern smaller scale workshop-type accommodation, particularly suited to newer businesses; and
- A lack of focus in supply in rural areas sometimes resulting in a failure to maximise opportunities.

Existing Demand

2.24. Demand for employment land and premises is influenced by a number of issues including socio-economic factors and general market drivers.

2.25. The DTZ report sets out a comprehensive analysis of the factors influencing demand for employment land and premises. One of the key factors considered that influence demand is socio-economic trends. The report highlights the following issues that will affect demand:

- A change in population has a direct effect upon workforce availability in West Cumbria. Both Allerdale and Copeland local authority areas experienced a decline in population during the period 2001 - 2006. It is however forecast that the population in Allerdale will increase marginally to 2016 and Copeland will experience a further slight decrease. An ageing population, which is a national phenomenon, will also result in a reduction in the workforce as a percentage of overall population;
- There is a gap in workforce skills at degree level and a reported shortage of employees with managerial, professional and technical skills. Improving workforce skills and attracting / retaining graduates is seen as essential in supporting economic growth;
- The nuclear sector provides many of the higher skilled and paid jobs in West Cumbria. Future prospects for the nuclear industry will have a direct influence upon the scope to continue to provide high skilled and high paid employment, which in turn will impact upon the overall economy, supply chain and flow of disposable income flowing into other sectors;
- Sellafield (specifically decommissioning activities) has a massive influence upon occupational profile, particularly in Copeland, producing a skew towards manufacturing. A fall in gross value added attributed to Sellafield has a marked impact upon on gross value added across Cumbria, and
- The rate of business formation in Allerdale and Copeland is similar to the Cumbrian, regional and national averages. Copeland has the highest rate of business formation, most likely to be associated with the nuclear sector. The increase in new business formation will have implications for the amount of new business space required within the authority areas.

Property Market Context

2.26. DTZ highlight that the West Cumbria Employment Land and Premises Review seeks to identify employment land requirements for the next 15 years and that within any 15 year period this is likely to encompass around two economic cycles (assuming a cycle is about 7 years) and as such the current economic crisis should average out over the plan period. DTZ indicate that medium to long-term planning should not be overly affected by the current economic downturn; however it does recognise that the current crisis is unprecedented in recent times, and could have longer-term implications on the functioning of the property market in the future.
2.27. The primary impact of the credit crunch has been to push demand back towards leasehold property principally due to the lack of availability of finance, but also to minimise risk. There has been a marked shift away from freehold purchases which were prevalent 12 - 18 months ago, particularly from smaller businesses.

2.28. Increases in construction costs are highlighted as a cause for concern. The drive by the public sector towards sustainable development is also creating challenges in areas where rents are historically low, and environmental and sustainability requirements are contributing to increasing construction costs, which cannot be justified in terms of increased rentals. Occupiers’ demands are becoming more discerning and the report indicates BREEAM Excellent is expected by many occupiers. There is, however, no current market evidence that occupiers would pay higher rentals to secure higher environmental and sustainable quality buildings.

2.29. The impact upon marginal locations such as West Cumbria is most significant. The report identifies a shortfall in the quality of employment space in West Cumbria which does need to be addressed if it is to compete in the wider market although this will be challenging given the general low level of values. This is particularly the case for office premises. Lillyhall is identified as a highly attractive office location because new offices have been occupied; however the report tempers this by stating that this is only because no quality office space was available elsewhere.

2.30. Abolition of empty property rates is also highlighted as having a significant impact upon speculative development, particularly in marginal locations.

2.31. DTZ highlight that West Cumbria is a marginal location and as such the public sector will have a key role to play in creating a property market. Due to its remoteness the market is predominantly locally driven and is likely to remain so for all sectors.

2.32. The DTZ study indicates that future demand is likely to focus upon smaller scale flexible workspace where occupiers can grow, change or adapt to ever-changing conditions. The report highlights that the demand in West Cumbria for managed workspace is healthy, and that WCDA schemes have high occupancy. Public sector led developments have received high demand due to the incentives offered, low rents and flexible occupancy terms.

2.33. More recent King Sturge discussions with WCDA confirm occupancy at 100% at Blencathra Business Centre and 88% at Moss Bay. West Cumbria House is fully occupied by HMRC. WCDA confirmed that whilst occupancy levels remain high at their sites, they are experiencing declining levels of enquires which will no doubt impact upon future demand and the likelihood that voids may increase during 2009.

2.34. A number of larger businesses have been drawn to the area due to inward investment opportunities and the levels of public sector support available.

2.35. The importance of the nuclear sector to West Cumbria should not be underestimated and it is recognised that this creates demand. However, the DTZ report states that there is general uncertainty about the quantum, quality and nature of demand and also when this is likely to start. Uncertainty over lengths of future nuclear contracts has led to uncertainty over occupational requirements, and this is likely to continue.

2.36. The Energy Coast Masterplan presents a public sector vision for West Cumbria based upon environmental technologies focussed upon the nuclear sector. The property implications from nuclear decommissioning and growth in the wider energy sector are uncertain. The DTZ report indicates that future requirements will be based upon the office sector, focussing on office space to support teams involved in managing and designing nuclear-related construction projects and to accommodate support functions located on the Sellafield site.

2.37. There is likely to be a significant supply chain related to decommissioning and termination for the medium term. The report highlights however that unlike construction, decommissioning activity has very little off-site requirement and activities are generally low-tech. However, demolition and decommissioning of buildings would generate a large volume of non-contaminated material and there is potential for an associated recycling plant. Lillyhall is indicated as a potential location for such a facility.

2.38. DTZ identify that waste and nuclear materials management are the most technically challenging areas of work at Sellafield and these areas present the most scope for new business development and spin out and creation of higher value businesses. The provision of start up, incubator and research and development space is critical to support these work areas.
2.39. Key issues from a property context are identified as:

- High quality buildings in keeping with the profile of the businesses, serving a market where quality and integrity are paramount;
- Location - close to a main transport route and travel time to main customer/client (usually Sellafield or Westlakes Science and Technology Park);
- Affordability; and
- Security.

**Past Take Up of Employment Land**

2.40. The DTZ report analyses the ratio of enquiries to take-up for employment land and records that, for the 5 years to 2006/7, West Cumbria received 250-300 enquiries per year and that approximately 20% of these enquiries translated into transactions. However conversion rates in 2007/8 had fallen significantly to around 10%.

2.41. It is noted that a 20% conversion rate is the maximum that would be expected to be achieved, and probably most likely reflects the fact that potential occupiers would only look to West Cumbria for specific reasons, i.e. because they are local firms or are drawn in by a particular sector e.g. nuclear/energy related.

2.42. In terms of the source of enquiries, an analysis over the previous 6 years to 2007/8 indicates a much higher level of local enquiries compared with those from inward investors.

2.43. When the enquiry type is analysed in terms of successful conversions, (see table below), the Report notes that over the last 2 years, take-up by local investors has outstripped inward take-up. 2006/07 saw inward enquiries converted into 14,920 sqm (160,600 sqft), the highest figure over the period. This indicates the declining levels of local enquiries converted as well as a general demand for larger units from inward investors.

2.44. The Report provides a useful analysis of actual take up by sector as summarised in the table below. It can be seen that take-up by sector mirrors the changing economy of West Cumbria as discussed in the Phase 1 Report. Take-up by the service sector has been more erratic, but still accounts for the largest proportion of space. The take up from the manufacturing sector were considerably up in 2007/8 at 6,039 sqm (65,000 sqft) in contrast to the previous five years although the number of enquiries converted remained low. No specific reason is given for this increase in enquiries in 2007/8. In the past six years half of units required were under 93 sqm (1,000 sqft) and only 5 out of 40 required over 929 sqm (10,000 sqft).

2.45. The Report contains a detailed assessment of future demand for employment land based on past development rates, transactions, enquiries and employment forecasts. The supply side is analysed using data on space for different use categories i.e. B1, B2 and B8 currently available, under construction and with planning permission.

2.46. The following conclusions are drawn in respect of the 15 year land supply requirement in West Cumbria for each use category.

### Past Take Up of Employment Land

#### Enquiries Converted

<table>
<thead>
<tr>
<th>Year</th>
<th>Local</th>
<th>Inward</th>
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<tbody>
<tr>
<td>2002/03</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>2003/04</td>
<td>15</td>
<td>12</td>
</tr>
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<td>2004/05</td>
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<td>22</td>
<td>20</td>
</tr>
<tr>
<td>2007/08</td>
<td>20</td>
<td>15</td>
</tr>
</tbody>
</table>

**Source:** DTZ Employment Land Study 2008 - Comparison Local and Inward Enquiries

#### Take Up by Floorspace and Sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>2002/03</th>
<th>2003/04</th>
<th>2004/05</th>
<th>2005/06</th>
<th>2006/07</th>
<th>2007/08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service</td>
<td>181,410</td>
<td>77,700</td>
<td>86,700</td>
<td>15,800</td>
<td>135,400</td>
<td>20,200</td>
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<tr>
<td>Manufacturing</td>
<td>61,900</td>
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<td>23,500</td>
<td>14,100</td>
<td>5,000</td>
<td>65,000</td>
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<tr>
<td>Engineering</td>
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<td>19,300</td>
<td>11,300</td>
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<tr>
<td>Nuclear</td>
<td>4,000</td>
<td>1,600</td>
<td>45,500</td>
<td>20,000</td>
<td>39,200</td>
<td>36,900</td>
</tr>
</tbody>
</table>

**Source:** DTZ Employment Land Study 2008 - Annual Floorspace Converted by Sector
2.47. West Cumbria currently has 181 ha of employment land available on the sites considered as part of the study in addition to the available and committed supply set out in the Report. The requirements set out in the table above will only require 63% of this supply if none of the existing commitments came forward. There is therefore clearly a more than adequate supply to meet requirements during the plan period.

Lillyhall Industrial Estate

2.48. Lillyhall is recognised as one of the most significant employment sites in West Cumbria, being the largest single contributor to the existing supply. Due to the different characteristics of each quadrant at Lillyhall, DTZ undertook a qualitative assessment of the site scoring each area independently. The scores varied between 67-73%. The areas generally scored poorly on the sustainability criteria as they are Greenfield and distant from centres of population. However, Lillyhall was recognised as amongst the most attractive in market terms accounting for the largest amount of pipeline development in West Cumbria (with the exception of Sellafield). It has also benefited from significant investment from public and private sectors over recent years and provides the market with something that is not offered elsewhere in the employment land portfolio.

2.49. Given the scale of development already completed and the scale of opportunity remaining, the report states the importance of ensuring that the development of Lillyhall is supported to allow it to generate critical mass and become more sustainable and self-sufficient.

2.50. Key recommendations in relation to Lillyhall are:

- To resist residential uses;
- Integration with existing adjacent employment uses through refurbishment and redevelopment (in particular Alcan);
- Clearly differentiate between the roles of Lillyhall and Westlakes Science and Technology Park to avoid potentially competing for prospective occupiers;
- Lillyhall is best placed to cater for a broader mix of employment uses and occupiers that require larger format premises. Westlakes Science and Technology Park should continue to be the focus for knowledge-based industries (especially those related to the nuclear sector); and
- Defining Lillyhall as the location for skills development and Westlakes Science and Technology Park as the location for research activity.

Source: DTZ West Cumbria Employment Land Study 2008
3.0 Property Market – Key Influences
3.1. This section of the report identifies the key influences from a property perspective that have been taken into consideration in the development of the Masterplan.

3.2. Key drivers are again highlighted in bold. They should be considered together with the key drivers as highlighted in the previous section.

Lillyhall Business Survey

3.3. As indicated in the Phase 1 Report, a survey of businesses based at Lillyhall was undertaken to obtain current views and identify constraints to economic growth of local businesses within the Masterplan area. 37 of 80 known businesses on the estate responded to the survey.

3.4. The Phase 1 Report confirmed that of the respondents to the survey, some 83.8% described themselves as small or medium sized enterprises. Larger occupiers outside of this definition included Balfour Beatty, United Utilities, Acco Ltd and University of Cumbria, as well as the government subsidiaries; NWDA, NHS and Vehicle Operator Standards Agency. There are a number of mature businesses based at Lillyhall with nearly 25% of respondents having been based there over 15 years. Two businesses have been based there for over 30 years. Newcomers include Capita Symonds, Cumbria County Council and Acco Ltd.

3.5. Businesses are within manufacturing, vehicle sales, servicing and repair; public administration; education and health sectors. Many of the respondent businesses appear to trade locally (73% of respondents) suggesting a strong local business network. The majority employ 20 people or less. The majority of employees live in Workington (42%) and Whitehaven (26.5%) suggesting that businesses based at Lillyhall provide significant local employment. Whilst many employees live in the local area, Lillyhall is perceived to be isolated and, as such, 85% of the employees travel to the site by car, with 12% using public transport.

3.6. The survey of businesses paints a relatively healthy picture of the sustainability of businesses within Lillyhall, with 75.7% reporting that they were trading well, as established, successful and / or expanding businesses. The need for public sector support was limited with the majority of businesses (71%) indicating that they did not need any assistance to help their businesses grow. Of those requiring assistance, advice upon funding, availability of sites and premises and recruitment were the key issues.

3.7. 51.4% (19) of business respondents stated that they own their own premises. Furthermore, of the 45.9% (17) that rent, some 70.6% (12) do so from Space Northwest. Approximately 40.5% (15) of respondents were occupying premises under 464.5 sqm (5,000 sqft) from as little as 12 sqm (130 sqft).

3.8. Of those businesses that responded to the survey, 46% had no future plans for their sites or premises or were unwilling to disclose this information. However 21.6% of respondents confirmed that they would be looking to refurbish or extend their existing premises or relocate within Lillyhall. The majority of respondents (83.7%) described themselves as satisfied or happy with Lillyhall as a business location, with good access from the A595 and the availability of large, flexible accommodation being the primary advantages. Approximately 11% of respondents felt very unhappy, citing poor presentation and image of certain parts of the estate, poor signage and poor access by public transport.

3.9. Whilst overall business satisfaction at Lillyhall is very good, there is a lot more that can be done to improve the overall estate. The Masterplan addresses many of the issues raised by local businesses in terms of image / branding and signage. It is pivotal that existing businesses have the ability to expand or relocate within Lillyhall so the Masterplan must therefore accommodate future business expansion and provide serviced sites to allow the development of high quality new office and light industrial premises. Setting aside the current economic and funding constraints that are impacting upon the property sector, a significant proportion of the businesses based at Lillyhall are owner-occupiers, and it is assumed that there will be a preference to continue to own rather than lease premises in any expansion or relocations within the Estate. This needs to be addressed in any disposal strategy for land at Lillyhall which is owned by NWDA or other public sector land owners.

West Cumbria Property Market

3.10. The Phase 1 Report presented a brief overview of the sub-regional property market and West Cumbria in particular. In this section the West Cumbrian market is analysed in more detail looking at development and transaction data.

Development Data

3.11. Development activity or proposals in West Cumbria have been mainly public sector led either through the development of Masterplans for large scale regeneration proposals or via public sector...
3.12. The first of these is Eatonfield’s £100m plan for a mixed use development on a major brownfield site, (31 ha), comprising the former Corus Steel Works in Workington. This former steelworks site is located on the coast directly to the west of the town. The outline planning application includes proposals for 651 dwellings, 39,563 sqm of commercial space, a care and retirement village, small-scale retail (2,330 sqm), leisure and community uses, together with a package of highway and coastal improvements. Approximately 1,500 jobs will be created as a result of the development, which aims to create an attractive and sustainable residential / commercial environment on the west coast of Cumbria.

3.13. Eatonfield Developments bought the 87 acre Moss Bay site in 2007 and the demolition of the steelworks, which began in January 2008, is now complete. Work is expected to start on site in 2010 with the laying down of a main road and drainage systems. The development of residential and commercial outlets is then expected to begin in 2012 over a five year programme.

3.14. There are also discussions around the development of the Port Derwent site in Workington.

3.15. In terms of smaller scale development, Priority Sites has developed 12 new industrial units at Derwent Mills adjacent to Cockermouth Town Centre totalling 50,000 sqft, in units ranging from 2,900 to 5,100 sqft. Discussions with Priority Sites have indicated that there has been limited interest in the development and because of this the plans for a similar development at Lillyhall have been put on hold, (refer to Phase 1 Report - Development Proposals).

3.16. NWDA’s new high specification industrial units at Lillyhall East (7,500 sqft and 10,000 sqft) are now also available, although there has been limited interest to date.

Rental Levels

3.17. Discussions with local agents and our own investigations have indicated the following rental levels for office and industrial premises in the local market. The table above provides a comparison of values in West Cumbria with the rest of the sub region.

3.18. Demand for employment land and premises in Lillyhall and West Cumbria generally has traditionally been, and continues to be, dominated by a number of distinct groups of occupiers including:

- The Nuclear Industry and associated service industries;
- Large Scale Manufacturing Businesses;
- Local Government Bodies;
- Public Sector Agencies, i.e. NWDA, West Lakes Renaissance, WCDA; and
- Educational & Healthcare sectors.

3.19. As previously discussed, a large proportion of the economic activity in West Cumbria is linked to the Nuclear Industry and consequently the demand for land and premises is heavily influenced by this. The increased activity brought about by the contracts granted has stimulated higher than usual activity across both the office and industrial markets in recent years. This is demonstrated by the fact that there is little space currently available at Westlakes Science & Technology Park and several lettings have been reported at Greengarth Business Park and Dovenby Hall Estate.
3.20. Local agents Carigiet Cowan report that, other than from nuclear related businesses, there appears to be limited evidence of demand from companies outside the region. The majority of demand appears to come from local companies moving from older or unsuitable premises and regionally based companies locating in the area to service contracts from Sellafield. General (non-nuclear) demand tends to be rather sporadic.

Transaction Data (Office based)

3.21. Reviewing take-up shows that in the period since January 2007 almost 77,000 sqft of space has been let in the following schemes:

- **Westlakes Science & Technology Park**
  - **Innovation Centre**
    - 1706 sqft @ £12.50 per sqft, October 2009
  - **Kelton House**
    - 973 sqft @ £12.00 per sqft, May 2007
  - **Kelton House**
    - 950 sqft @ £13.50 per sqft, Sept 2007
  - **Kelton House**
    - 950 sqft @ £13.50 per sqft, Oct 2007
  - **Robinson House**
    - 1900 sqft @ £13.50 per sqft, Dec 2007

- **Igwell Hall**
  - 503 sqft @ £12.50 per sqft, August 2009
  - 882 sqft @ £12.50 per sqft, July 2009

- **Galemire Court**
  - 1000 sqft @ £13.50 per sqft, Spring 08

3.22. Most leases have been offered on easy-in easy-out terms. The current service charge is £4.60 per sqft (April 2008).

- **Greengarth Business Park**: 2 no. office suites of 6,886 sqft & 5,759 sqft at rents in the order of £6.00 per sqft.

3.23. The current service charge is £4.60 per sqft (April 2008).

- **Dovenby Hall Estate, Dovenby**
  - **Theatre Building**
    - 3,000 sqft @ £9.50 per sqft, April 07 NRL
  - **Sutton House**
    - 2,500 sqft @ £9.50 per sqft, Sept 07
  - **Westlakes Scientific Consulting**
    - 3,000 sqft @ £9.50 per sqft, June 08

3.24. Standard leases in most cases on multiples of 3 years. The current service charge is £2.50 per sqft (April 2008).

- **West Cumbria House** has a net lettable area of 31,740 sq ft. HMRC took occupation in two phases. Phase 1 comprising of 2/3 of the building, took place in mid December 2008, with the balance of the building being occupied from the end of February 2009.

Transaction Data (Industrial based)

3.31. This level of activity has perhaps not been mirrored to the same extent in the industrial sector in relation to large scale lettings of units in excess of say 25,000 sqft, with the exception of Acco’s move to their new build facility of 45,000 sqft at Lillyhall. Take-up levels of modern new build or refurbished space have been reasonably encouraging in the following locations:

- **Ullcoats Industrial Estate, Egremont** has seen the development of 2 no. industrial units of 20,000 sqft each, which are now occupied / under offer;
- **Kerry Park Trading Estate, Workington** – a new build scheme of circa 20,000 sqft in 10 units is now fully occupied;
- **Salterbeck Industrial Estate, Workington** – some 22,000 sqft of refurbished space has been let; and
- **Ullswater Court, Derwent Howe** – WCDA report lettings of some 7,000 sqft of refurbished space.

3.32. In addition, there has also been plenty of movement in relation to lettings of small and medium-sized units in locations such as Clay Flatts and Derwent Howe in Workington. Not surprisingly, occupiers prefer decent quality space at competitive prices which are easily accessible.
For example, areas such as Clay Flatts in Workington have been attracting a premium rent because a strong cluster of trade related occupiers / suppliers has developed. This has not, however, resulted in industrial rents increasing across the board in West Cumbria.

3.33. At present there are only modest levels of recorded demand for specific employment land and premises requirements within West Cumbria. Although enquiry levels are reasonable and take-up levels have been encouraging in the last couple of years the current downturn in the market will have a negative effect on demand going forward.

Implications for future development at Lillyhall

3.34. The demand for employment land and premises in West Cumbria will directly influence decisions to be made in relation to the future development of Lillyhall.

3.35. The DTZ Employment Land and Premises Study considered evidence of past take-up to help inform levels of demand and an analysis of this provides an indication of future demand if past trends continue.

3.36. DTZ evidence of past demand is presented using the following data:
- Employment Land Take-up (completions);
- Deals and Transactional Evidence; and
- Enquiries for Employment Land and Premises.

3.37. The first provides evidence of developer demand. The latter two provide evidence of occupier demand.

Employment Land Take-up by Type

3.38. DTZ analysed land take-up between 2002 and 2008. Across West Cumbria as a whole, average annual take-up was 3.96 ha per annum compared with an average annual take-up over the whole of Cumbria of 24.6 ha per annum as can be seen in the table opposite.

<table>
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<th>Sub County Area</th>
<th>02/03</th>
<th>03/04</th>
<th>04/05</th>
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Source: Cumbria County Council Schedule 7 Developed Land by Sub County Areas & Allerdale and Copeland Borough Councils (categories are CCC categories of land)
3.39. Take-up in Allerdale averaged 1.02 ha per annum over the six year period with Copeland’s average take-up being 2.90 ha per annum over the same period.

3.40. This took into account Business Park, Local Employment, Own Use, Port Related and Strategic Employment locations.

3.41. Following an analysis of the actual developments which account for the take-up, DTZ conclude that:

- Almost all office (B1a and B1b) development has been on Business Park and strategic employment sites; and
- Most of the development on local employment sites has been industrial (B1c, B2 and B8).

3.42. Over six years from 2002/03 to 2007/08:

- Offices have been built on 19.7 ha of land equating to 3.3 ha per annum; and
- Industrial uses have been built on 4.1 ha of land equating to 0.7 ha per annum.

3.43. DTZ’s analysis of this take-up reflects a shift towards office development driven by a number of factors:

- Public sectors drive to restructure the economy;
- Anticipated demand from an evolving nuclear sector; and
- The low supply of office accommodation in West Cumbria.

3.44. West Cumbria accounts for only 16% of total employment land take-up in all of Cumbria. Traditionally West Cumbria has had a weak market for employment land, compounded by its physical remoteness.

3.45. Both DTZ’s and the consultant’s own analysis of the market indicate that this is driven by locally generated, low value demand. Those developments that have been successful, i.e. West Lakes Science & Technology Park and Lillyhall, have benefited from significant public sector investment.

3.46. Three quarters of take-up has occurred in Copeland, but can be wholly attributed to take-up at West Lakes Science & Technology Park (16.4 ha). This is seen as a key attribute for West Cumbria given its nuclear specialism and the fact it represents a significant proportion of West Cumbria’s best quality office stock.

3.47. It is worth noting that DTZ make the point that most of this development, i.e. West Lakes Science & Technology Park, has been driven through public sector policy and funding rather than strong market demand. The market has, however, now recognised that a critical mass of development has occurred and this has attracted speculative development and is seen as the key driver of genuine market demand for office space in West Cumbria. However, in the current economic climate, the pace of market led development is likely to be much slower.

3.48. DTZ research indicates that local employment development completions indicate a more active market in Allerdale, which accounts for approximately three quarters of take-up. It is highlighted that this is a large share of extremely low overall take-up. Excluding West Lakes Science & Technology Park in Copeland, average annual employment land take-up falls from 3.96 ha to 1.36 ha.

3.49. ABC completion data (analysed by DTZ) for the last three years confirms that an average completion floorspace of 2,264 sqm per annum (equates to 2,058 sqm per ha / around 22,000 sqft) indicating relatively low density of development.

3.50. An analysis of Allerdale and Copeland employment land take-up by location over a six year period highlights which locations are most attractive to the market (NB much employment development in West Cumbria has been publicly led / supported). Employment land take-up in Allerdale by location is summarised in the table below:

<table>
<thead>
<tr>
<th>Location</th>
<th>02/03</th>
<th>03/04</th>
<th>04/05</th>
<th>05/06</th>
<th>06/07</th>
<th>07/08</th>
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<td>0.54</td>
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<td>2.81</td>
<td>6.17</td>
</tr>
</tbody>
</table>

Employment Land Take-up by Location: Allerdale (ha)
03
Property Market – Key Influences

3.51. 41% of Allerdale’s employment land take-up has been focused on rural areas. This is due to the fact that Lillyhall is categorised as being within a rural area.

3.52. Take-up in Workington has been for predominantly local uses, including take-up at Annie Pit Lane and Derwent Howe Industrial Estate in 2007/08. Cockermouth accounts for 1 ha largely due to development at Lakeland Business Park (0.75 ha). (This scheme includes a car showroom as well as offices.)

3.53. Overall, employment land take-up indicates that development demand is extremely low, and where completions have taken place these have been pump primed by the public sector.

Deals and Transactional Evidence

Office

3.54. As part of the DTZ study, an analysis of commercial property transactions which occurred in West Cumbria over the last three and a half years (to October 2008) was undertaken.

3.55. Over the three and a half years 6,000 sqm (64,000 sqft) of office floorspace has been transacted, an average of 1,704 sqm per annum (18,300 sqft). It is worth noting that 75% of this was transacted in 2005/06 with the sale of Christopher Harding House in Whitehaven comprising 4,300 sqm (46,000 sqft). Setting this aside, transactions fell to a total of 1,633 sqm (17,600 sqft) over the 3½ year period or 467 sqm (5,000 sqft) per annum.

Industrial

3.56. An analysis of transactions in this sector over the same period, i.e. April 2005 - September 2008, shows that activity was far more buoyant with 12,010 sqm (129,300 sqft) transacted which averages 3,431 sqm per annum (35,600 sqft). Statistics indicate that traditional levels have been relatively constant during the above period, but peaked in 2005/06 at 4,374 sqm. Activity is focussed upon the key industrial estates geographically distributed throughout the two Boroughs.

3.57. DTZ concluded that using standard plot ratios they can convert the transaction data into land requirements;

3.58. The DTZ study undertakes a review of the geographical distribution of transactions for both office and industrial sectors, and the following conclusions are noted:

3.59. Office market deals were spread between the two Boroughs with concentrations in the following locations:

- Whitehaven Town Centre;
- Cockermouth Business Parks;
- Maryport;
- West Lakes Science & Technology Park.

3.60. Deals show that where new space has been brought to the market, it has been taken up (Europe Way, Cockermouth, and West Lakes Science & Technology Park). DTZ conclude that this could suggest demand is constrained by a lack of supply. It is worth noting that demand has been predominantly for small units (excluding Christopher Harding House) and all units are below 325 sqm (3,500 sqft). The average size transacted was 116 sqm (1,250 sqft).

3.61. DTZ produced a schedule of industrial transactions during the same period. A review of these highlighted the following:

- Industrial transactions are concentrated around the key industrial estates - Solway, Salterbeck, Clay Flatts, Bridge End, Leconfield and Sneckyest; and
- It is worth noting that only two transactions
exceeded 1,858 sqm (20,000 sqft) at Glasson and Leconfield. One transaction was between 929 sqm (10,000 sqft) and 1,858 sqm (20,000 sqft). Four transactions were between 465 sqm (5,000 sqft) and 929 sqm (10,000 sqft). The largest proportion of transactions (15 in total) were in the 93 sqm (1,000 sqft) to 465 sqm (5,000 sqft) category, followed closely by 13 transactions in the below 93 sqm (1,000 sqft) category with the majority of units being around 47 sqm (500 sqft).

3.62. It is clear that the majority of the transactions, i.e. some 80%, were for units below 465 sqm (5,000 sqft) and 46% of these were for units below 93 sqm (1,000 sqft).

Enquiries

3.63. The consultants have commented earlier in the report upon the levels of historic local and inward enquiries for employment floorspace in West Cumbria, as analysed by DTZ in the employment land and premises study.

3.64. Recent discussions with both WCDA and Space Northwest have both indicated that occupancy levels remain good in their existing business centre facilities although the levels of enquiries are sporadic, but conversion rates remain good despite the current economic climate. Recent lettings at Lillyhall Business Centre indicate there is good demand for small office suites and industrial units where flexible terms are available. Probably the biggest threat to attracting new occupiers is the very limited supply of available office space at Lillyhall and a lack of small to medium sized industrial units restricting choice.

Employment Forecasts

3.65. Modelling employment growth is an alternative approach to predicting future employment land requirements. The DTZ study has reviewed three sets of forecasts:

- Forecasts produced by Experian in September 2007 as part of the West Cumbria Spatial Masterplan;
- Forecasts produced by Cumbria Vision; and
- Forecasts produced by DTZ as part of an earlier Employment Site and Premises Study in July 2006.

3.66. The DTZ report analysis looks at growth in the B1 (Office), B2 (Industrial) and B8 (Warehouse) jobs for 2008 - 2023 in addition to translating this into future change and employment land requirements. The study provides a summary of the employment projections and their implications for the employment land review which are summarised below:

- Experian forecasts show that if a planned series of “transformational” projects are implemented, between 2007 – 2027, the number of full-time equivalent (FTE’s) will be 72,000 - compared to only 58,800 if nothing is done to support the economy; and
- Cumbria Vision forecasts suggest declining employment totaling around 5,800 fewer jobs from 2008 to 2023. The majority of this decline can be accounted for by job losses at Sellafield. The resulting floorspace is estimated to fall by around 187,000 sqm which translates into declining employment land requirements of 47 ha.

3.67. DTZ forecast estimates the following long term changes (2008 – 2023) in West Cumbria.

<table>
<thead>
<tr>
<th>Employment Type</th>
<th>Baseline Land Requirements</th>
<th>Optimistic Land Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>sqm per annum</td>
<td>ha per annum</td>
</tr>
<tr>
<td>Office (B1)</td>
<td>740</td>
<td>0.2</td>
</tr>
<tr>
<td>Industrial (B2)</td>
<td>-3,627</td>
<td>-0.9</td>
</tr>
<tr>
<td>Warehousing (B8)</td>
<td>-867</td>
<td>-0.3</td>
</tr>
</tbody>
</table>

DTZ Employment Land & Premises Study 2008

The continuing decline in industrial employment of between 600 - 1,600 jobs. This results in floorspace of 19,720 - 54,400 sqm and a fall in employment land requirements of 4.8 - 13.6 ha or -0.9 - 0.3 ha per annum, and

Warehouse employment to remain fairly static. Under their baseline scenario it is estimated to fall by 200 jobs, however, under their optimistic scenario around 200 jobs are created by 2023. This translates into floorspace requirements of -13,000 sqm to +13,000 sqm and employment land requirements of -3.7 ha to +3.7 ha per annum or -0.3 ha to +0.3 ha per annum.
Property Market – Key Influences

Current Availability

3.66. Attached at Appendix 11 are schedules of currently available sites and premises at Lillyhall. It is worth stating that occupancy levels within Lillyhall appear to be very high with few available office or industrial units.

3.69. An analysis of the current availability of existing premises reveals:

- Available office space is confined to four good quality small suites in Lillyhall Business Centre with a total floor area of 200.76 sqm (2,161 sqft);
- The availability of small industrial premises (under 5,000 sqft) is limited to four units at Lillyhall Business Centre ranging from 70 – 140 sqm (750 – 1,500 sqft). These are good quality modern industrial units;
- The availability of medium sized units (464.5 sqm – 929 sqm) (5,000 – 10,000 sqft) is limited to the two new high quality units being developed by NWDA at Lillyhall East, and larger units over 929 sqm (10,000 sqft) are in short supply, and with the exception of the Alcan complex of buildings which are under offer, the only availability is at the Stobart complex where a unit of 4,734.70 sqm (50,964 sqft) is available for warehousing use.

3.70. The availability of development land is less constrained and NWDA, who are the main owner of undeveloped land within the estate, have availability in plots from 0.2 – 4.269 ha (0.5 – 10.55 acres) totalling 9.52 ha (23.52 acres) at Lillyhall Business Park, which is targeted towards B1 development, and sites from 0.2 – 7.247 ha (0.5 – 17.92 acres) totalling 11.91 ha (29.44 acres) at Lillyhall East and Lillyhall West for B1, B2 and B8 uses.

3.71. The largest single site owned by NWDA at Lillyhall North of 10.627 ha (26.25 acres) is currently the subject of development proposals from a local developer (see appendix 1 for more detail).

3.72. As indicated above there is an acute shortage of available office space at Lillyhall and as such any larger office enquiries over 457.2 sqm (1,500 sqft) will struggle to find any availability within the estate.

3.73. Similarly, the supply of modern, small industrial units is constrained, and as such there is a lack of choice for footloose enquiries to be accommodated.

3.74. The availability of the two new NWDA industrial units at Lillyhall East will provide some choice in the medium size range, however given the size of the Lillyhall estate this is still a very limited offer.

3.75. The consultants do not know what the proposals will be for the Alcan site but the availability of this complex of buildings which includes individual buildings ranging from 1,672 – 14,754 sqm (18,000 – 158,811 sqft) provides an opportunity for refurbishment / redevelopment to provide a range of unit sizes.

3.76. In the wider area, the DTZ employment land and premises study identified that there was only some 47,260 sqft of office accommodation currently available within Allerdale according to WCDA. This equates to approximately 6% of supply. Workington has the largest amount of available office accommodation in Allerdale with 29,818 sqft, which represents nearly two thirds (63%) of Allerdale’s available office accommodation. Cockermouth has the second most available office accommodation with 13,500 sqft (28.56%) of total available office accommodation. WCDA records show that Copeland has 34,144 sqft of office accommodation currently available. This equates to approximately 4% of supply.

3.77. Enquiries of local agents, stakeholders and potential owner occupiers that have the financial resources to purchase are also looking at the recent falls in property values and are ‘sat on their hands’ pending whether the market has further to fall before it hits rock bottom. This is true for all sectors.

3.78. The DTZ study recommends that there should be a clear distinction between the accommodation offered at Lillyhall and Westlakes Science and Technology Park. The Study argues that Lillyhall is better placed to offer the manufacturing / support services, in order that Westlakes can concentrate on the more technical Research & Development or management based occupiers, particularly in
respect of nuclear related businesses.

3.79. However, Lillyhall is proving to be an attractive location for office occupiers, evidenced by HMRC’s recent move to Lillyhall Business Park. Delivery of the Masterplan recommendations through a combination of enhanced public realm and the provision of an appropriate scale of speculative high quality office premises can ensure that Lillyhall is well placed to secure a share of any occupational demand that does exist. It can also ensure that Lillyhall will be in a good position to capitalise upon enquiries associated with construction and other activities in the nuclear and alternative energy sectors, as well as being able to attract office occupiers that do not require or need to be at Westlakes Science & Technology Park. The recent completion of the Energus training and education facility on the Business Park will assist / strengthen links to these sectors.

3.80. Although demand for employment land and premises in the area is low, further exacerbated by the current economic climate, West Cumbria needs to have a supply of modern good quality built space readily available to house both locally based expanding companies and attract footloose requirements, when they are identified. In many instances, requirements of this nature do not have the time to consider new build options from scratch, and as such it is imperative that a steady supply of new build space keeps coming through the development pipeline. In the consultant’s experience, particularly in the office sector, occupiers wish to “see and touch” the finished product and do not have the vision or patience to wait for something to be built.

3.81. Industrial occupiers will still continue to require new space which meets modern industrial requirements. This will be across the range of sizes of units, but evidence indicates demand will be predominantly at the smaller end of the scale, and will not exceed units of 4,645 sqm (50,000 sqft).

3.82. The current limited choice of available office and industrial accommodation at Lillyhall is likely to have a negative impact upon attracting new investment and providing opportunities for expansion / growth of existing businesses. The public sector agencies need to seriously consider this in the context of supporting existing businesses seeking to expand and attracting inward investment.

3.83. A schedule of planning applications submitted to Allerdale Borough Council during the last 18 months is attached as Appendix 12. The majority of the applications submitted relate to satisfying planning conditions upon existing proposals and minor applications for signage, CCTV installations, and air conditioning plant. There are only two applications for new development both of which received planning permission.

3.84. These two proposals relate to:

- Erection of a commercial garage at Pittwood Road made by Eilbeck Motors – Full planning permission granted (Ref 2/2008/0668); and
- Outline permission for employment development (use classes B1, B2 and B8) including the formation of a mini roundabout on land between Stagecoach Bus Depot and CG Ford Car Showroom on Blackwood Road (Ref 2/2009/0020).

3.85. In addition, pre-application discussions are taking place in relation to Northern Developments proposals for the site at Lillyhall North and this party has submitted a request to ABC for a Scoping Opinion on mixed use development (Ref SCO/2008/0004).

3.86. The limited number of new development applications could be attributed to a number of factors:

- Current economic and financial conditions;
- General low levels of demand for development land;
- Limited availability of non public sector owned sites; and
- Public design/sustainability build requirements upon public sector controlled land which may stifle private sector demand.

Lillyhall Business Survey

3.87. The Lillyhall Business Survey evidences that a significant proportion of occupiers based at Lillyhall are SME’s occupying accommodation under 464.5 sqm (5,000 sqft). Overall business satisfaction is very good and a number of existing businesses are looking to grow through expansion of existing premises or to relocate within Lillyhall. Future provision of affordable serviced sites and speculative high quality office and light industrial space should ensure existing business needs can be accommodated, to retain existing employers in an area where local employment predominates.
3.88. Lillyhall is of a scale that can accommodate these needs and the proposed Masterplan provides for a potential broad range of offer to accommodate general office based activity, high quality light industrial uses (complimentary to Research & Development activities at Westlakes), light industry, general industrial uses and distribution uses.

3.89. Given prevailing rental levels and values, and coupled with the limited and uncertain levels of demand, the likelihood of private sector developers committing in the short term to undertake developments of the quality and standard required on a speculative basis is, in our opinion, unlikely.

3.90. This situation is further exacerbated by the difficult economic climate which the UK and indeed global economy is facing at present. This uncertainty is being felt across the commercial property market as a whole and the difficulty in securing development funding makes it almost impossible for private sector developers to consider speculative or part pre-let development schemes even in prime locations, never mind the short term by undertaking direct development in the early phases of the Masterplan’s delivery. However by doing this the public sector will be able to set a benchmark for quality and meet sustainability requirements that the private sector may not be able to meet in the current market given the low levels of value achievable.

Energy Coast Masterplan

3.91. Implementation of Britain’s Energy Coast Masterplan presents an exciting opportunity for attracting new occupiers to Lillyhall. Whilst local agencies, property agents and developers are positive about what this could mean for West Cumbria, in terms of employment and property requirements there has to date been limited new nuclear related business investment from outside of the region. Most of the limited demand that exists has come from local and regionally based companies moving from older or unsuitable premises locating into the area to service contracts from Sellafield.

3.92. The Nuclear Decommissioning Authority (NDA) has recently commenced the disposal process in relation to the sale of approximately 250 hectares of land adjacent to Sellafield. The NDA expects to sell a proportion of the land included in the recent nomination to the Department of Energy and Climate Change’s Strategic Siting Assessment. It is anticipated that this land disposal will be concluded by the end of 2009.

3.93. The potential for new nuclear power generation at Sellafield provides significant opportunities to attract new investment into West Cumbria that will hopefully secure existing employment and create new employment opportunities. As a regionally significant strategic site, Lillyhall is well placed to benefit from the development of new nuclear power generation at Sellafield. The provision of advance high quality office and business space would in the consultant’s opinion be pivotal in attracting those companies that may be involved in the design, construction and commissioning processes.

3.94. Obviously it is difficult to be prescriptive about what this will mean for Lillyhall in terms of new development activity. However as previously stated it is important that a steady supply of high quality new build accommodation is maintained through the development pipeline.
4.0. Education and Training Opportunities
Education and Training Opportunities

Future education capacity

4.1. The Phase 1 Report set out the education/training focus of the strategic plans for West Cumbria. The underlying theme is to raise skills and increase participation in further and higher education to ensure that the population has the right balance of skills and expertise to support the needs of businesses which will in turn help to grow the GVA of the West Cumbria Economy.

4.2. Britain’s Energy Coast Masterplan promotes the need for an increased focus on nuclear/energy related education and training programmes which will also include spin-offs into health/medical related education and training, engineering and construction skills and more general business and enterprise-based programmes.

4.3. The Energy Coast Campus, centred on Lillyhall, is a major initiative which will play a significant role in delivering the skills needed to develop Britain’s Energy Coast. The Campus will be a collaboration between Energus, the University of Cumbria, Lakes College, the Nuclear Decommissioning Authority and Lancaster University. The higher level objective of the Campus is to achieve 1,000 additional learners in Further Education/Vocational training and 1,000 additional learners in Higher Education served at/from Lillyhall by 2016.

4.4. Lakes College – The College occupies a purpose-built site at the southern end of the Lillyhall Estate. It includes a range of realistic working environments for vocational study, excellent learning environments, as well as a learning resource centre, a well-equipped library and study space. The College provides education and training to 5,000 students a year, 1,500 of whom are under the age of 19, the remainder being adults. Most of the young people study on a full-time basis, whilst the adults are more likely to be following part-time programmes. Courses are offered at all levels from introductory to postgraduate, including Higher Education in the form of Foundation Degrees, HNCs and HNDs. The student numbers above equate to a full-time equivalent of circa 1,750 learners on campus at any one time.

4.5. An increase in student numbers across the whole range of attainment levels and course types is one of the College’s key targets.

4.6. Energus – West Cumbria’s £20m iconic project to construct a 6,000 sqm of floorspace for the provision of vocational skills excellence in the nuclear, carbon-free and environmental restoration industries is now complete. The building includes engineering and construction workshops, training and meeting rooms, a 204 seat lecture theatre and a Learning Gateway Centre to support hot-desking and distance learning.

4.7. Energus is currently in discussions with a number of partners regarding the development of a Management, Enterprise & Leadership Centre as part of the overall offer from the Centre to the Energy Coast.

4.8. Energus is also acting as the delivery arm for The National Skills Academy Nuclear (NSAN) and will offer courses specifically designed to meet the needs of the local supply chain. In addition, the University of Cumbria’s first presence on the Energy Coast Campus is at the Energus building.

4.9. Lillyhall is a key opportunity for the Energy Coast Campus project based within Energus.

4.10. University of Cumbria – The first intake of students is planned for September 2009 with the University taking 600 sqm of space in the building (Energus) with a capacity for 250 full time equivalent students. In addition the University is developing a requirement for a construction facility focusing on energy and renewables, The Centre for Excellence in Renewable Energy and Sustainable Engineering known as CERESE, which will be linked with the College’s new construction facility referred to below. This may require in the region of 2,000 sqm of floorspace.
**Education and Training Opportunities**

**Additional Educational Provision**

4.11. Alongside the core delivery at Lakes College, the nature of training and learning at Lillyhall will become very diverse in the future. Energus will concurrently accommodate the 16-18 year old apprentice market with seminars and business programmes for managers, with an undergraduate market served by the University of Cumbria, which will in itself be both dispersed and heterogeneous. The Learning Gateway will be a drop-in facility for learners engaged in Higher Education with the University. There will be formalised top up, degree, and postgraduate training in business, management and engineering, serving part-time mature students and full-time undergraduates.

4.12. In the short term, there is a need to develop the new construction centre for Lakes College to feed the supply chain in construction, not least to provide a quality environment from which to meet the needs from the nuclear industry for the decommissioning process and for likely nuclear new build. This is likely to require up to 5,000 sqm and a preferred site close to the existing main College has been identified.

4.13. CERESE is a focal point of the overall Masterplan for Lillyhall. The objective of CERESE is to develop capability locally in the application of existing technologies in the environmental, renewable, low carbon fields. It should utilise the engineering platform provided at Energus and the construction platform created at the College and become a hub for the development of the renewables sector in Cumbria. The University of Cumbria’s School of Sustainable Engineering is already based at Energus and is involved with key projects such as the Solway Barrage. Additional development of laboratory and workshop facilities for CERESE, close to Energus, would provide the most cost efficient solution, enabling maximum utilisation of the existing capability. It is essential that CERESE develops enduring relationships with the engineering Small and Medium Enterprises (SMEs) at Lillyhall. Energus should be at the heart of the existing engineering capability and future proposed development.

4.14. As already noted the additional learner markets will be diverse. However, the short-course business sector, 16-18 apprentice, and undergraduate market will all create an educational and residential accommodation demand. Whilst it is appropriate that both Whitehaven and Workington Town Centres provide a residential accommodation option for 2nd and 3rd year students, there should also be a range of accommodation at Lillyhall. The offer needs to cater for business people requiring hotel type short term facilities, as well as including term-time and single person and family accommodation, and some weekend managed accommodation for apprentices. An accommodation village would need approximately 250 bed units in total in varying configurations, but based around a single core and style.
5.0 Options Process
5.1. This section of the report explains how the commission moved from a research position, through an options development and assessment process, to the final Masterplan.

### Stakeholder Workshop

5.2. As part of the Masterplan process a Workshop (held on 13th November 2008) was arranged to seek the views of wider Stakeholders. This included Council Officers, Councillors, local businesses and landowners, as well as other relevant bodies with interest in the Lillyhall. Led by the consultancy team, the first session was an introduction to the project and a summary of the key physical and economic drivers. This involved presenting the key emerging findings of the Phase 1 Report to ensure that stakeholders understood the basic context in which the Masterplan was being developed.

5.3. The second session was undertaken in a group-discussion style, using a ‘creative thinking’ or 6 coloured hats’ approach. The hat methodology works by focussing group discussion around 6 themes or angles, as follows:

- **Facts and figures (white):**
- **Emotions and feelings (red):**
- **Positive focus (yellow):**
- **Cautious focus (grey):**
- **Creative thinking and new ideas (green):**
- **The way forward (blue):**

5.4. With consultant and Steering Group members facilitating discussion, each table was chaired by an invited attendee. A number of issues were raised under each theme / colour, with the most commonly mentioned subjects summarised in the table opposite.

5.5. Each group was also to formulate a ‘Vision Statement’ for the future of the Estate. The resultant visions are set out below:

- To ensure Lillyhall becomes the premier employment centre for West Cumbria, delivering cohesive education and work opportunities in a co-ordinated, well-managed, sustainable environment.
- A strategically well-located exemplar employment and education park which is a vibrant, safe, diverse and yet integrated development where businesses can flourish to the benefit of local communities and the local economy.
- Economic regeneration led by harnessing and developing learning skills across:
  - Nuclear;
  - Nursing / Health;
  - Use of renewable energies;
  - Create a brand;
  - Have a whole site Masterplan to guide development;
  - Create improved linkages to the port to improve transport infrastructure;
  - Focus on enhancing the setting, not just fitting in;
  - Create a centralised services area e.g. banks, food outlets, gym;
  - Transport improvements (road, rail, bus and cycle networks);
  - Create a political consensus;
  - Create a brand for the site;
  - Create a single entity to guide the development of the site;
  - Produce a whole site Masterplan.
5.6. Key messages were taken from this event and informed the development of the Masterplan, in particular:

- The importance of the site’s location in an attractive setting;
- The need for a sustainable approach to development that provides for the local economy whilst responding to more nationwide opportunities;
- The need for a clear brand;
- The need for the provision of services within the Estate; and
- The need for quality – in terms of jobs, design, highways, landscape, indeed in all aspects of the future of the Estate.

Options Development

5.7. Following the workshop and the finalisation of the Phase 1 Report, a process of options development was undertaken. This was led by consultants and presented and consulted upon with the Steering Group.

5.8. The initial stage was to identify the key sites that could offer development opportunities. These were then prioritised in terms of primary and secondary sites – those that could easily be delivered and less easily delivered (e.g. those with an existing occupier or other major constraints). The sites are indicated on the diagrams that follow:

5.9. Primary Sites:
- Areas 1 and 2;
- A596 East;
- A596 West;
- A595 Corridor;
- Area 6 West; and
- Alcan / Area 8.

Figure 5.1: Key opportunity sites – primary
5.10. Secondary Sites:

- Area 3;
- Area 5 North;
- Area 5 South; and
- Area 9.

5.11. The primary and secondary opportunity sites were developed through internal consultant workshops involving designers, town planners, sustainability advisers, engineers, cost and risk consultants and property consultants. They were informed by the full knowledge of the findings of the research undertaken during the Phase 1 Report, together with any subsequent information that had come forward, and emerging evidence as set out elsewhere in this report (for example property information).

5.12. At this stage options were of a strategic nature. They also took into consideration the possibility that the new West Cumberland Hospital may re-locate to Lillyhall. A number of sites for the Hospital were considered and at the time of the Phase 1 Report, Lillyhall was one of the preferred locations. However the decision has been made subsequently by the NHS to develop the new hospital on the existing Whitehaven site.

5.13. The following key approaches emerged:

- Approach 1 – Existing commitments with health;
- Approach 2 – Health led; and

5.14. The Strategic Spatial Masterplans that emerged from these approaches are illustrated in the diagrams that follow.
05 Options Process

Figure 5.3: Approach 1 – Existing Commitments with health

Figure 5.4: Approach 2 – Health led

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5.15. These options were presented to the Steering Group on 15th January 2009. This was supported by a draft options appraisal table, which was populated by the consultant team and the Steering Group. The appraisal table is included as Appendix 2 of this report for reference.

5.16. The table appraises the three options as well as the implications these would have on the primary and secondary opportunity sites.

5.17. A scoring and weighting approach to options was taken, as well as a specific score by the Steering Group identifying broad fit with corporate objectives of the Steering Group’s representative bodies.

5.18. With the knowledge of the hospital locating elsewhere the lead option was identified with the Steering Group as Approach 3 (Energy / Renewable led) with elements of Approach 1 (i.e. reflecting existing commitments etc.). This analysis process has informed the progression of the Masterplan into its final form.

Figure 5.5: Approach 3 – Energy / Renewable led
6.0 The Lillyhall Masterplan
Introduction

6.1. The following two sections of the report describe and illustrate the physical Masterplan that has been developed for Lillyhall in direct response to the key drivers and options analysis process. The physical Masterplan considers three dimensional solutions for the whole estate together with its wider relationship with West Cumbria. In this respect, this section commences with overall strategic objectives including the vision and brand, followed by a more detailed explanation of the potential architectural and landscape character of specific areas within the Masterplan.

6.2. This detailed description links into the Design Framework section that follows in section 7, focusing on design guidance. The Design Framework is also complemented by a stand alone ‘Design Prospectus’ document which has been produced to provide a summary of site layout and design specifics relating to Lillyhall for stakeholders and prospective investors.

Vision

6.3. The Vision for the future of Lillyhall has been informed by the stakeholder workshop session and developed between the consultants and the Steering Group into the following statement;

6.4. ‘Lillyhall will make a strategic contribution to employment in West Cumbria with an emphasis on integration between industry, commerce, education and training, featuring high quality design in an attractive landscape. Lillyhall aspires to be a nationally recognised centre for the application of knowledge, skills and technology in responding to the challenges of sustainable energy production and low carbon solutions.’

6.5. Employment is an essential part of the Masterplan and the aspiration is that this should be achieved using the latest sustainable technologies, particularly as part of the wider contribution towards Britain’s Energy Coast™ Masterplan.

6.6. The Energy Coast™ Masterplan identifies that West Cumbria has “major nuclear assets and internationally competitive expertise and skills in a range of related activities, including environmental remediation, engineering and decommissioning. Employment in research and development is double the regional average.” An important objective of this approach is that by 2027, West Cumbria will be a globally recognised nuclear, energy, environment and related technology business cluster, with a strong, diversified and well connected economy with a highly-skilled population. The Energy Coast™ Masterplan also draws on the area’s natural environment, ensuring that any negative aspects of its location are overcome and its benefits are maximised.

6.7. This Masterplan for Lillyhall aims to contribute significantly to the achievement of these objectives.

Branding

6.8. It is important to define a strong identity for Lillyhall which gives it a recognisable profile, both at a local and wider level. As perceptions of Lillyhall begin to evolve, investment which will contribute to this identity will be encouraged reinforcing the long-term Vision.

6.9. In order to establish the identity, it is essential to define a ‘brand’ that builds upon Lillyhall’s existing strengths as an established employment destination with existing strong linkages to the wider region. In terms of marketing Lillyhall to prospective businesses, these strengths should be clearly stated.

6.10. The proposed brand for Lillyhall has been developed as two complementary components of ‘name’ and ‘strapline’. The name ‘Lillyhall’ will be maintained as an essential definition of the location within West Cumbria. However, it is not proposed to maintain any of the ‘sub names’ for the different areas - Industrial Estate, Business Park etc; but to formalise and simplify the brand by using North, South, East and West to aid wayfinding, address detailing, traffic signage etc. as shown at figure 6.1.

6.11. The proposed strapline has been distilled from the strategic objectives defined in the Vision as; Energy – Delivery – Space, resulting in an overall brand as illustrated in figure 6.2, below.

6.12. The logo and strapline illustrated below have been designed specifically for Lillyhall and are used

Figure 6.2: The proposed Lillyhall brand logo.
The Lillyhall Masterplan

throughout this document. Graphically, the shapes in the logo represent the three key elements and point towards Lillyhall as being a catalyst for their further development. The colours are inspired by Lillyhall’s position within the surrounding area – green for the countryside and blue for the sea. Having two strong colours helps to define a uniform brand. The font used is clean with a bold style, suggesting Lillyhall’s strong position within the area and importance to the Energy Coast™ Masterplan. The words used in the strapline incorporate the following brand values:

6.13. **Energy**: reflects the important contribution Lillyhall can make towards achieving the vision of Britain’s Energy Coast™ Masterplan, and is one of the proposed primary land uses for Lillyhall. It also reflects the Energy of the place itself and what it offers;

6.14. **Delivery**: reflects two elements – delivery of the Masterplan and delivery of development. One of the key aims of both the Lillyhall Masterplan and the Energy Coast™ Masterplan is delivery, and there are a number of key bodies that can assist, not least NWDA; and

6.15. **Space**: reflects the fact that there is space within Lillyhall to develop, and that new floorspace will be created to accommodate new and existing occupiers. It also reflects the feeling of space generated by the open setting and surroundings of Lillyhall.

6.16. The brand and associated logo, font and colours are recommended to be used on all documentation, marketing material, websites, signage etc. This will help define the brand and make it identifiable – to local communities, investors, developers, occupiers and Councils.

Figure 6.1: Masterplan Wayfinding – Lillyhall North, South, East and West
The Masterplan Strategy

6.17. Figure 6.3 opposite illustrates the Masterplan Strategy – the agreed approach as identified through an iterative options process that has evolved through presentation and feedback from the project Steering Group and major stakeholders.

6.18. The broad land use configuration illustrated in the Masterplan Strategy diagram responds directly to the findings of the Phase 1 Report, the aspirations set out in the Vision, property and education evidence detailed in sections 2 and 3 of this Report. The most influential drivers have been as follows:

- Current known development proposals;
- The importance of a range of floorspace, allowing for start-up businesses in managed workspace to larger scale manufacturing and distribution facilities;
- The demand for expansion opportunities from existing occupiers;
- The ability to develop speculatively in the early phases of the Masterplan;
- The need to contribute towards Britain’s Energy Coast Masterplan;
- Improving educational requirements, responding to the needs of educational establishments and the ‘knowledge gap’ that exists in the wider region; and
- Improving the presentation and image of Lillyhall.

6.19. The focal point within the Masterplan is an area defined as the “Local Hub”. This is envisaged as the future nucleus of interaction within Lillyhall, maximising the benefits of its central location and its proximity to the education facilities. Whilst its focus is serving local workers, students and residents, it will also benefit from passing traffic on the A595 and A596.

6.20. The adjacent Lillyhall West area takes energy as the defining application, building upon the important role of the recently opened Energus Centre, a centre of excellence in education and environmental industries. Energus will be reinforced through the University of Cumbria’s plans to develop a CERESE (Centre for Excellence in Renewable and Sustainable Engineering) in an adjacent area. The Masterplan embraces these and other contributory businesses in Lillyhall West, but also anticipates an enhanced environment through the provision of a substantial central park area that will create a setting for new employment buildings, evoke a sense of place and link to a series of green routes that contribute to the overall sustainability credentials.

6.21. Lillyhall North has a primary purpose of employment and office development, together
The Lillyhall Masterplan

with a range of employment-based land uses. These proposed uses broadly reflect known developer interest, in particular east of the A595.

6.22. The area defined as Lillyhall East presently incorporates a number of established businesses. The Masterplan proposes where possible to work with these businesses to achieve an enhanced environment through smaller-scale infill development, guidance for longer-term redevelopment as buildings reach the end of their useful life and environmental upgrades, in particular through the introduction of green routes.

6.23. Lillyhall South includes two distinct primary uses of education and renewables (technology and delivery). The proposals have been developed in close consultation with Lakes College and allow for short and longer term education expansion requirements. The renewables area is located on the Alcan site and takes account of existing developer and business interest in renewable industry and green waste. The area immediately adjacent to the A595 is seen as an important interface to adjacent education uses with associated synergies in development of renewable research and delivery. As a spin off to this research there may also be the opportunity to introduce a Lillyhall Combined Heat and Power (CHP) facility.

At this point it is recognised that the viability and deliverability of such a facility would be subject to further detailed investigations. Consistent with other areas of the Masterplan, improvements to the green network, existing wildlife habitats and linkages to the wider natural environment will also form an important part of Lillyhall South.

The Masterplan

6.24. The physical Masterplan that has been derived from the Masterplan Strategy is shown in fig 6.4 opposite. The plan illustrates a potential building and open space layout that would deliver the strategy and vision for Lillyhall. The detail in relation to the different areas and the principles that should be applied in encouraging high standards of design are set out through this and the following sections of the report.

Outputs

6.25. The Masterplan delivers in the region of 200,000 sqm (gross) of new floorspace, a net gain of 66,250 sqm, taking into account the loss of existing space on site, over a 20 year period.

6.26. Key outputs are identified below:
• 71,229 sqm employment (B2 / B8 use), which equates to 2095 jobs*
• 54,432 sqm offices (B1 use), 2865 jobs*
• 14,488 sqm office / incubator space (B1 / B2 use), 760 jobs*
• 4,732 sqm managed workspace (B1 use), 235 jobs*
• 3,500 sqm education
• 4,175 sqm car showroom
• 3,500 sqm Local Hub / retail 55 jobs*
• 9.55 ha green / open space
• 3.48 ha wildlife area
• over 5,000 parking spaces
• In total, 6,000 – 7,000 jobs (gross estimated)*

6.27. In terms of calculating net change, and applying the same formulae, the following is estimated:
• 70,150 sqm of B8 floorspace is lost, which equates to 1400 jobs*
• 18,800 sqm of B2 floorspace is lost, which equates to 550 jobs*
• and 3100 of retail (Gates Tyres) is lost, which equates to 35 jobs*
• In total, 4,000 – 5,000 jobs (net estimated)*

* These job densities are based on Arup / English Partnerships note ‘Employment Densities: a simple guide’ (2001) – the industry standard. They are indicative only and are not given where there is no guidance on densities to avoid misinformation.

Densities used are 1/34 sqm for employment (B1/2), 1/19 sqm for general office (B1), 1/20 sqm for retail, 1/3 beds for the hotel (estimated 50 bed budget hotel), 1/50 sqm for B8 use, and 1/90 sqm for retail (Gates Tyres).

Key Property Market Issues

6.28. It was recognised at an early stage of the Masterplan process that a site the size of Lillyhall was devoid of certain support facilities that would normally be expected to be found upon most employment park developments the size of Lillyhall.

6.29. As indicated in the Phase 1 Report, development proposals have already been received by NWDA from a developer to deliver a mixed use scheme comprising a hotel (budget 50 bed), 881 sqm of offices (9,500 sqft), 2,936 sqm (31,600 sqft) of light industrial, roadside uses including a petrol filling station, motor dealerships, a small A3 unit and a small truck stop. It is understood that the developer has received strong interest in the hotel and truck stop, and is aware of demand for the office units.

6.30. Following consideration of a number of alternative scenarios by the Masterplanning consultant team, it has been agreed that key elements of the scheme proposed by
Figure 6.4: The Masterplan
6.31. The Masterplan has given consideration to the creation of a ‘hub development’ comprising small scale food retail facilities (Spar / Co-op type) together with a limited number of small scale unit shops that could facilitate provision of a café / sandwich shop, dry cleaners / laundrette, ATM banking facilities, etc. and small office suites / workspaces located above the retail units targeted at support services such as dentist, solicitors etc. Discussions with ABC indicate that there are already enquiries being received by the Planning Department for this use. The whole health and fitness market has been affected by the recession and a number of mainline operators are facing severe financial difficulties and many closures are taking place. The future demand for such facilities is uncertain, particularly in a business park type location, which operates predominantly Monday - Friday. As a result of this, the Masterplanning team consider that provision should be made within the Masterplan for some form of “facility accessible to the wider community” that could provide potential health and fitness facilities, entertainment space etc. at a future date within the Masterplan timeframe.

6.32. The provision of purpose built student residential accommodation that would offer students at Lakes College or undergoing training at the Energus facility the opportunity to live close by and provide students from outside of the local area residential accommodation equivalent to that found at university / college campus elsewhere. The location of the proposed student accommodation would be adjacent to the “hub” to promote use of the retail and other facilities.

6.33. Consideration has also been given to the development of a gym / health and fitness facility within the hub. However following consideration, King Sturge does not believe that this would be sustainable in this location despite enquiries having been received by ABC Planning Department for this use. The whole health and fitness market has been affected by the recession and a number of mainline operators are facing severe financial difficulties and many closures are taking place. The future demand for such facilities is uncertain, particularly in a business park type location, which operates predominantly Monday - Friday. As a result of this, the Masterplanning team consider that provision should be made within the Masterplan for some form of “facility accessible to the wider community” that could provide potential health and fitness facilities, entertainment space etc. at a future date within the Masterplan timeframe.
The Local Hub

6.36. The Local Hub is seen as providing a sense of place within Lillyhall. New uses and open spaces have been created to respond to local interaction with an emphasis on providing facilities and services that can be used throughout the working day for the benefit of the Lillyhall area. Uses provided within the Local Hub will therefore include a small parade of retail units with office space over providing the potential for professional services and other small businesses requiring locally accessible space. Alongside the retail provision will be space for future development of a small community facility / crèche and gym. These two elements have been provided to respond directly to the latent demand from the increased number of people that will inhabit the business, employment and education areas of Lillyhall. The location of the Local Hub with good access to the walking/cycle and road networks is therefore crucial in relation to activity patterns during the working day. Buildings are envisaged as two and three storey, providing the appropriate level of enclosure and physical presence (see figure 6.5).

Figure 6.5: The Local Hub looking west from the A595/A596 roundabout.
6.37. The Local Hub is also seen as the interface between energy, education and renewables thereby potentially providing the opportunity for interaction between different businesses, for instance an informal meeting in the café bar located in the retail parade. Consequently, proposals for student accommodation, managed workspace and further office provision have all been positioned around the Local Hub to take full advantage of the facilities and provide the greatest opportunity for interaction.

6.38. A further advantage of the Local Hub position is the ability to define the physical heart of Lillyhall. It is proposed that this could be further reinforced by the creation of a sculptural bridge structure acting as a local landmark crossing the A595 (see figure 6.6). The bridge is seen as a pedestrian/cycle facility that will be an important component of the network of routes forming the ‘green loop’ around the whole of Lillyhall. The bridge also connects directly into a park and recreational area to the north east to the Local Hub, which will be a further important amenity that this area can offer to the whole Lillyhall community.

Figure 6.6: The landmark bridge crossing the A595.
Lillyhall West

6.39. Lillyhall West essentially divides into two distinct areas either side of Blackwood Road. The area to the west includes a series of existing businesses including Energus, Cumberland Pencil Factory and HM Revenue and Customs. New buildings in this area are seen as primarily energy and business focused with an emphasis on delivery of the technology and support associated with the environmental industries. Two and three storey buildings have been located to define principal routes and wherever possible maintain long distance views north west to the coast.

6.40. The area to the east of Blackwood Road also presently includes a series of businesses, including a number of car dealerships and the Stagecoach Bus Depot. The main difficulty with the present building form is the absence of definition to the A595 as a principal corridor passing through Lillyhall. The Masterplan proposes to address this issue by locating new buildings along the edge of the A595 with access generally achieved from the rear. The majority of new buildings will be two storeys with three storey elements used to provide corner articulation and gateway emphasis. This overall long term aspiration is identified in the Masterplan however it is recognised that an incremental approach is required for this area. In this respect buildings and sites will be upgraded and modified in accordance with principles set out in the Masterplan document as and when sites become available. This approach would also apply to the central park area, located to the rear, where the significant open space provision has been developed as a direct response to a large working population associated with a fully executed Lillyhall Masterplan. Clearly it is only sensible to develop such an amenity as and when the demand requires. Equally if provision of new employment space alongside Blackwood Road is seen as desirable this should not be discouraged providing the principles of amenity/setting and green linkage are not lost.

Figure 6.7: Potential employment building alongside the A595.
6.41. The A595 splits the Lillyhall North area into two separate parcels. The area to the west is presently occupied by the Eddie Stobart Limited depot that tends to dominate views on approach from the north. In the fullness of time this area is seen as a primary location for B2/B8 type employment accommodation, supplemented by further B1 type employment on the north west perimeter, positioned to make the most of the aspect overlooking open countryside.

6.42. The area to the east of the A595 forms a principal gateway to Lillyhall and has the potential for high profile uses that are best placed to take advantage of the A595 frontage. The relationship with the roundabout which links to Workington, further reinforces this site as a location for gateway uses. In response the Masterplan proposes a new hotel, petrol filling station and a parade of car dealerships together with a range of office and employment units and supporting open space provision. Buildings will be a maximum of two storeys with the hotel extending to three storeys should the need be identified (see figure 6.8).

To the east of Lillyhall North, a zone for habitat retention has been included as specific mitigation to ecology issues identified in the Phase 1 studies. (see figure 6.8)
Lillyhall East

6.43. Numerous existing businesses presently operate from the Lillyhall East area. The Masterplan proposes to work with these businesses infilling and repairing frontages over an extended period as and when sites become available. The Masterplan has initially identified zones alongside Joseph Noble Road, the A595 and Pittwood Road as areas for intervention. This will comprise B2 type employment accommodation very much in accordance with the existing provision in Lillyhall East. The building intervention will be complemented by a public realm and signage upgrade that once again links with the wider green network aspiration. The primary frontage to the A595 is also upgraded with new landscape treatment introduced to improve the appearance and disguise some of the more utilitarian buildings (see figure 6.9).
Lillyhall South

6.44. Education, car showrooms and employment are the dominant uses within the Lillyhall South area. As with other areas the A595 splits the area into two distinct parcels. It is the intention of the Masterplan to retain as much of the existing uses as possible with the Masterplan providing the opportunity to link future uses through a shared approach to issues such as the delivery of environmental technology.

6.45. Major intervention west of the A595 focuses upon Lakes College with proposals to develop a new education building alongside the road. The new building will provide a high profile visible frontage for Lillyhall. New College workshop buildings will be developed alongside Hallwood Road with the benefit of improving the outlook, natural surveillance and levels of activity on this route that will become one of the new linkages from the College to the Local Hub area. New buildings will be a maximum of two storeys in scale, in line with the existing provision on the College Campus.

6.46. The area to the east of the A595 is presently dominated by large format industrial buildings that are a legacy of the Alcan site. Where possible it is envisaged that these buildings will be re-used and upgraded with new architectural treatment reflecting the importance of the A595 frontage. This new frontage will be formed from three elements collectively providing the renewable energy offer for Lillyhall. The original Alcan reception building will be refurbished as the ‘campus’ welcome building. The large format building adjacent will be upgraded and provide the manufacturing facilities. This will be complemented by a new curved building that will provide a showcase for knowledge transfer facilities. This could include research, seminar/conference and exhibition space very much complimenting the proposals that are being developed for the Lakes College site. This new frontage of buildings will also function as a screen to green uses behind, that could include household waste recycling and waste to energy facilities as part of the Lillyhall CHP initiative as described previously (see figure 6.10).

Figure 6.10: View of Lillyhall South
The level of ambition that is envisaged for Lillyhall will take time to deliver. A phased approach to development over a 20 year timeframe has been considered in order to understand how the individual components will contribute to the overall strategic objectives.

6.47. The phasing strategy considers broad time periods of 5 year increments however it is likely that there will be a ‘blurring of edges’ between different periods and the potential for overlap where there is interaction between adjacent uses. The major elements in each time period are as follows:

6.48. The phasing plan illustrated in figure 6.11 and provides a strategy that reflects the balance between the delivery of important elements of the Masterplan with aspects such as land / property availability (e.g. the possibility of bringing the Local Hub forward early in the Masterplan, subject to positive negotiations to acquire the land), building quality (e.g. when buildings reach the end of their useful life), known and projected developer and occupier demands and forecasts (e.g. managed workspace and educational facilities) and current commitments. Clearly phasing is time sensitive, therefore as new initiatives / development and funding opportunities come forward, it should be reviewed in order to ensure the wider objectives are being achieved. The phasing strategy provided in this report should be viewed as a guide rather than a set of inflexible restrictions.

6.49. Developments that have achieved a certain level of momentum or have been progressed to a relatively detailed level, such as a planning application submission, have been included in this period. Within this category are educational development and managed workspace in Lillyhall South, and the start of developments at Lillyhall North. It also assumes that certain elements of the Local Hub and other energy / office opportunities within Lillyhall West will come forward in this period. This assumption is based upon existing interest in a number of the proposed business uses within the Local Hub (small café/sandwich outlet) and potential public sector forward funding for office development. However, all of the commercial aspects of the Local Hub will be demand driven and subject to individual viability studies. Investment in infrastructure and improved public transport will be undertaken in this first period. These important ‘early win’ projects will be on the whole public sector led and are a critical example of where the new Lillyhall brand, Energy, Delivery, Space can be reinforced.

0 to 5 Years

6.50. The second phase of development incorporates sites where interest is understood to be strong or where the public sector are able to influence the initial pump priming of investment. This includes areas such as the student accommodation in Lillyhall South, office/energy projects in Lillyhall West, employment and public realm upgrades in Lillyhall West and reconfiguration of the Alcan site. Highway infrastructure works in areas identified in orange on figure 6.11 will be necessary in the 5 to 15 year period. This work will be capacity and demand driven, very much dependant on the level and type of accommodation proposed on the various development sites. The exact phasing period has consequently been left broad in order to respond to these issues.

5 to 10 Years

6.52. The third phasing period has been identified as coming forward in the third phasing period. By this stage it is believed that the Masterplan will be maturing and energy/office development and associated uses in the wider area will be generating the need for further employment space.

10 to 15 Years

6.53. Further infill employment development in Lillyhall East has been identified as coming forward in the third phasing period. This includes energy/office development and associated uses in the wider area, with the prospect of unlocking the potential for additional commercial development in Lillyhall West.

15 to 20 Years

6.54. Development identified within the final phase mainly consists of sites where complex land acquisition exists or an established business is in place that has no immediate requirement to move. This includes energy/office development on the A595 corridor, redevelopment of the Lillyhall North site presently occupied by Eddie Stobart Ltd and the renewables interpretation facilities building in Lillyhall South.
Figure 6.11: Phasing Plan
Security Framework

Introduction

6.56. The Security Framework for Lillyhall, shown in figure 6.12, illustrates a number of interventions to enhance the site security and to ensure appropriate security as the Masterplan develops. This builds upon the existing measures previously implemented, such as the CCTV system, and has been developed following liaison with the Architectural Liaison Officer at West Cumbria Community Safety Department within Cumbria Constabulary.

6.57. The proposed interventions are described in broad terms, beginning with overarching principles and then looking in more detail at the specifics. It is proposed that security interventions are brought forward throughout the life of the Masterplan. Associated costs are presented in Section 11.

6.58. The interventions to be considered are:

• Natural Surveillance;
• Security Lodge;
• Closed Circuit Television;
• Alarms;
• Lighting;
• Boundary Treatment;
• Paladin Fencing;
• Metal Railing;
• Dry Stone Walls;
• Willow Hedge;
• Defensive Planting.

6.59. Although there are identified hot spots as set out in the Phase 1 Report, crime levels are not generally high at Lillyhall. However, increased levels of development and occupation may generate a more attractive proposition for criminal activity. It is therefore important that security measures are fully integrated with future development to help to ensure that Lillyhall maintains and improves its attractiveness to occupiers.

6.60. In broad terms, as Lillyhall develops it is essential that new developments seek Secured by Design status, and that consultation with the Architectural Liaison Officer is promoted by ABC and NWDA throughout the design, planning and development process. The specific Secured by Design Guidance for commercial premises is currently being re-written and will be available on the following website in the near future www.securedbydesign.com.

Natural Surveillance

6.61. Natural surveillance limits the opportunity for crime by taking steps to increase the perception that people can be seen. It is achieved through the placement of physical features, activities and people in such a way as to maximise visibility and generate positive social interaction, whilst increasing scrutiny and limitations on potential offenders’ escape routes. It is typically free of cost, however its effectiveness to deter crime varies with the individual offender.

6.62. Achieving widespread natural surveillance across Lillyhall is seen as the foundation to a solid overall security strategy. The current situation does not enable natural surveillance to occur freely, owing mainly to the overgrown landscaping and the orientation of existing buildings.

6.63. The thinning and selected removal of vegetation should be promoted to open up views between buildings and roads, and vice versa. The management of vegetation on site is crucial to retaining these views; restricting shrubs to a maximum height of 1m and ensuring that the tree canopy is retained at 2m high should form part of the landscape management regime. Such interventions must integrate fully with the wider landscape strategy as set out later in this section of the report.

6.64. The creation of active building frontages that overlook highways, car parks and open spaces provides a passive deterrent to criminal activity. New buildings proposed for the northern edge of the A595 in particular should address and overlook the road, footpath and cycleway.

Security Lodge

6.65. It is proposed that a Security Lodge be located within the Local Hub. It is an important element of the security framework, and it is envisaged that the Lodge will be manned 24 hours a day through a management agreement with the managers of Lillyhall (possibly the Lillyhall Partnership – see Delivery & Funding section), allowing concentrated monitoring of the CCTV and alarm systems and providing rapid communication with Cumbria Constabulary.

6.66. The benefits of having an on-site security lodge are numerous. Firstly, it would act as a deterrent as well as a dedicated facility focussing solely on Lillyhall. Signage across Lillyhall advertising the presence of a dedicated facility could convey this message. Secondly, the current system is monitored at the Workington control room and competes with Workington town centre for the attentions of the operator; a Lillyhall-specific control room would resolve this situation and allow rapid response to localised and smaller-scale security issues. However, it would be important
Figure 6.12: Security Framework

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to work closely with the local Police and CCTV operators to ensure that an appropriate system and joint working arrangements are put in place.

6.67. Remote ‘help-points’ across Lillyhall could also provide an emergency service, linking directly to the security lodge. A secondary use for these ‘help-points’ could be for pedestrian / cyclist orientation, providing a useful service.

6.68. It is recognised that the Security Lodge is however an expensive proposal within the Masterplan and forms part of longer term aspirations. In the earlier phases of the Masterplan, the security communication network should therefore be designed to maintain monitoring through the Workington control room with upgrades and enhancement of the system to ensure appropriate security levels are achieved as the phases are implemented.

Closed Circuit Television (CCTV)

6.69. Lillyhall currently has a system of six cameras that monitor the site as identified at figure 6.12. These cameras currently transmit to the Workington control centre located in the Worksington town centre multi-storey car park and were installed with funding through the Lillyhall Partnership.

6.70. The aspiration is to add another six cameras to the system (see figure 6.12 for suggested locations) increasing the coverage and effectiveness. The cameras should be located to monitor vehicles entering and exiting, focusing too on potential crime hotspots such as the proposed Local Hub.

6.71. The use of infra-red lighting in conjunction with the cameras should be promoted. This greatly increases the quality of the pictures after dark, although if white street lighting was introduced, the necessity for infra-red would be reduced.

6.72. Using domed cameras further increases effectiveness as the criminal does not know the direction in which the camera is facing, thus acting as a greater deterrent. The cameras should send pictures via wireless bridges to the security lodge on-site and / or at Worksington.

Alarms

6.73. Currently, buildings across Lillyhall (25 in number) use alarm systems linked directly to Alarm Receiving Centres (which subsequently contact the Police as appropriate). These ‘unique reference number’ systems are necessary in remote areas where a physical alarm siren may go unnoticed. Another potential benefit of the proposed Security Lodge could be that instead of linking alarms directly to the Police they could be routed to the Lodge to allow for an initial response that could be enforced by a security guard. It is important to maintain close working relationships with the Police however and it is recommended that security proposals are developed in partnership accordingly.

Street Lighting

6.74. On all new build sites it is recommended that phone lines are buried and form part of the underground utilities network. This reduces the risk of lines being cut and disabling alarm systems.

6.75. The introduction of white street lighting should be promoted across Lillyhall. The white lights give better colour rendering and have been proven to reduce ‘fear of crime’ by providing a brighter street scene. White lights are marginally more expensive to run, although they have a greater life-expectancy and are therefore more cost-effective in the long term.

Boundary Treatment

6.76. There are four proposed boundary treatments for Lillyhall, which can be used in conjunction

**White Light - High Pressure Sodium Vapour (SON)**

**Orange Light – Low Pressure Sodium Vapour (SOX)**
The Lillyhall Masterplan

6.77. It is also important to be mindful of the short term temporary measures that will prevent invasion by occupying travellers whilst designated plots await development. This could be as simple as the formation of earth bund walls made from site arisings and planted with wild seed to soften their appearance.

6.78. **Paladin Fencing** - A 2.4 metre high paladin fence is proposed for various areas of Lillyhall (similar to that already used in various locations) providing aesthetic appeal with strength and security. It is proposed that the existing palisade fencing in the Pitwood Road area is replaced with colour-coated paladin. It is considered that this, in conjunction with other environmental improvements, will greatly improve the visual appearance of this area and remove the ‘fortress image’.

6.79. It is recommended that a uniform colour scheme of dark green, as shown in the image below, should be adopted, thus achieving a greater level of consistency.

6.80. Finally, paladin fencing has also been proven to be more secure than palisade fencing and Cumbria Constabulary actively promote its use across the County. At Lillyhall it is recommended that the use of paladin fencing on main road frontages is minimised and the following alternative measures are implemented.

6.81. **Metal Railing** - On key frontages, for example facing the A595 or the proposed green spaces, it is proposed that metal railing will give Lillyhall a higher quality image. It would be important to maintain the railings in good condition for example through regular painting or choosing a low maintenance finish such as powder coated galvanised steel. The use of elements of the logo could be introduced into the design to help strengthen the brand and unity its appearance. At one metre in height, these rails will act as a physical deterrent to unauthorised access, clearly differentiating between public and private space.

6.82. **Dry Stone Wall** - On high-profile frontages, traditional style dry stone walling could be used to secure boundaries. Using local stone will provide a high quality, sustainable boundary solution, again helping to create a distinct brand for Lillyhall.

6.83. **Willow Hedge / Living Wall** - Around the Arcan site (Lillyhall South), the proposed uses (e.g. recycling activities) could be secured with a ‘living wall’ such as a willow hedge. This boundary treatment, when mature, is secure, aesthetically pleasing and impenetrable (and contributes to habitat creation).

**Defensive Planting**

6.84. In association with other boundary treatments, or indeed when used in isolation, defensive planting forms an inexpensive, natural and colourful secure boundary. Three of the most commonly used plant types are Berberis, Pyracantha and Genista hispanica as shown opposite. Other popular choices include Rosa rugosa, Ilex aquifolium and Crataegus monogyna.
6.85. It is important that a robust landscape maintenance regime is implemented across Lillyhall, ensuring that defensive planting does not overgrow, and in so doing have a negative impact on natural surveillance and CCTV sightlines for example. Where possible, defensive planting could be implemented during phase one of works at Lillyhall. This would allow time for it to establish in advance of any building work, and where possible local indigenous species should be used.

Landscape Strategy

Introduction

6.86. The Landscape Strategy for Lillyhall has been developed to identify short-term improvements to the external environment thereby helping to deliver the overall long-term vision. The Strategy sits alongside the physical design principles and includes design guidance to help achieve the objective of producing a holistic approach to Lillyhall. This will assist in achieving a coherent landscape appearance with common elements throughout, and builds upon the significant work already achieved by the Lillyhall Partnership. It will also be supported by recommendations for associated long-term management requirements.

6.87. The Strategy consists of five main elements:

- Landscape Structure;
- Green Loop Network;
- Open Space Network;
- Wildlife and Ecology; and
- Management Guidelines.

6.88. This section of the report should be read in conjunction with the Landscape Strategy Plan opposite, which indicates the location of the cross sections that illustrate the potential external environment envisaged at Lillyhall together with the ecology issues described in Section 9.

Figure 6.15: Section C: On-site example of dry stone walling and its use in a typical section (see figure 6.12 for location)

Figure 6.16: Section D: Example of a living wall and its use in a typical section (see figure 6.12 for location)
Figure 6.17: Landscape Strategy

- Open Space Network
- Natural / Wildlife Area
- Waste / Recycling / Biomass
- Landscape Structure (1)

Legend:
- Study Area
- Existing Movement
- ‘Green Loop’ - Cycle & Vehicular Segregated Route
- ‘Green Loop’ - Cycle & Vehicular Shared Route
- ‘Green Loop’ - Bound Gravel Rustic Track
- Key Views
- Section Lines

(1) Landscape Structure - Dense tree planting with understorey planting and woodland edge character

- Potential for enhanced biodiversity & SUDS
- Central Park
- Open space network - College campus existing sports field
- Access to the countryside

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Landscape Structure

6.89. **Enhance existing enclosure** – The Phase 1 Report identified that there is a strong overall landscape structure currently offering enclosure and screening to the various developments within Lillyhall. This consists of native tree species and woodland edge planting that has been introduced throughout the lifetime of Lillyhall and now forms a mature block of established planting. This is at its most prominent along the north western edge and to the perimeter of the current Eddie Stobart site (Lillyhall North). The Strategy recommends that mature structure is mostly retained and reinforced in places where there are gaps. However, the Strategy has also identified areas and zones where the planting should be removed to enhance views out of and within the developments.

6.90. **Open up & retain key views** – The Phase 1 Report identified key views out to the coast and mountains. These are marked on the Landscape Strategy Plan. At these locations holes can be punched out of the planting to frame the identified views.

6.91. **Remove landscape structure to western side of Spine road (A595)** - The Masterplan identifies Lillyhall West as being an ideal location for offices. The structural planting on this side will have to be removed or significantly reduced fully to exploit the potential for creating active frontages along this edge of the corridor. The Strategy proposes retaining as much of the planting structure as possible on the eastern side, as it provides a strong sense of visual continuity along the corridor and effectively screens a number of less attractive industrial areas.

6.92. **Extend landscape structure** – The Masterplan allows for the opportunity of extending the planting structure throughout the emerging developments. It is essential that this is done in a controlled manner to ensure that a high quality setting for the developments is achieved without obscuring and compromising frontages. Landscape screening can be applied / strengthened in areas such as the renewables area (Alcan site) to help soften its impact.

**Green Loop Network**

6.93. **Create Green Loop Network** – the Masterplan has been developed to incorporate a Green Loop to assist in providing healthy and sustainable ease of movement throughout Lillyhall. This will build on existing footpaths and cycleways and supplement them with the introduction of a new network that relates to the emerging development sites. In particular the green loop will enable students, workers and local residents to walk or cycle to the Local Hub.

6.94. **Enhance existing cycleway / footpath** – there is an existing cycleway that forms part of the eastern footpath to the A595. This provides an opportunity for enhancement through the introduction of waymarking elements, such as illuminated bollards, occasional seating and public art along the length of the route. The proposed Green Loop network will use this current cycleway to form part of the circulation network.

6.95. **Link to National Cycle Trail** – Route 72 is a Coast to Coast Trail that runs adjacent to Lillyhall. The Landscape Strategy proposes that the Green Loop network links into this trail at the south west corner of the site.
6.96. **Create strong access to countryside** – the Green Loop will forge stronger links to the surrounding countryside directly through the national cycle trail and more indirectly through the newly created green way alongside the recycling and renewables centre in the south east of Lillyhall South.

6.97. **Create language for Green Loop Network**

i.e. tree-lined routes / lighting / security & safety – the strategy proposes four types of treatment to create the Green Loop network:

- The first is the enhancement to the existing footpath as described above;
- The second is the introduction of a new three metre wide shared surface of combined footpath and cycle path. The surface could be a non-slip resin bound aggregate or coloured bitmac that is built to vehicular specification, with low hedges and trees along each side. It is anticipated that vehicle movement on this section of the loop will be minimal, providing mostly service / emergency access to the units. Architectural lighting, with matching seating for resting, will be included every 50 metres;
- The third treatment is similar to the second, but has a cycle path alongside the footpath on one side of the carriageway only. This will apply to parts of the loop that require provision for vehicular circulation; and
- The final treatment is more rustic in nature and is more appropriate in less urban and built-up areas, such as required for accessing the countryside and providing a link to the National Cycle Trail. This will be constructed from resin bound gravel and include basic lighting for security purposes.
Open Space Network

6.96 Creation of high quality spaces – A series of open spaces have been created within the Masterplan to ensure that the development zones do not over-dominate the existing semi-rural setting, thereby reducing the potential for adverse landscape and visual impacts. These spaces will be linked by the Green Loop and arranged to form a hierarchy to reflect the adjacent zones and associated uses:

- **Central Park** – this is a new green core to the heart of Lillyhall West. It would consist of mainly open space in the form of amenity grassland enclosed by low hedging, moderate mounding and sculpted landform. Small groups of trees can provide a simple parkland character to this space. Hardstanding areas should be minimal, but some seating areas can be introduced connected by a simple self-binding gravel path;

- **College and Student Accommodation** – the existing College grounds offer plenty of opportunity for informal activity for the students, as well as formal sporting events such as football and cricket. There would be substantial break-out space to the rear of the student accommodation to provide for informal student interaction. The character of this area would be similar to that described for the central park but of a smaller scale;

- **Local Hub** – this area will receive a reasonably high level of public realm intervention. The landscape will be predominantly hard in character to reflect its anticipated usage. This will include high quality concrete flagged footpaths with conservation kerbs. This area should be predominantly for pedestrians, but allowance could be made for some short-term parking at the front to support the commercial uses. The carriageway should be constructed of bitmac and could include ‘Tegula’ block paving to form the car park bays. The overall character of this space would be enhanced by the introduction of a suite of stainless steel seating with matching bins, lighting and cycle stands;

- **Light Industry and Employment Zones** – the Masterplan to ensure that the development zones do not over-dominate the existing semi-rural setting – more information is provided in the Sustainability description (Section 6).

Wildlife / Ecology

6.99 The Landscape Strategy has endeavoured to address the issues and incorporate the recommendations made in the Phase 1 Report by the ecology consultant. In particular, it aims to enhance and increase the biodiversity of Lillyhall and offer provision and protection of wildlife species including hen harriers, barn owls, bats and potentially great crested newts, in the suggested new landscapes. The creation and reinforcement of the landscape structure will help to create ‘Green Fingers’ & wildlife corridors. The wet rush pasture is, where possible, retained and enhanced owing to its Biodiversity Action Plan (BAP) habitat potential (see Habitat Map, appendix 4, Phase 1 Report).

Management Guidelines

6.100 Owing to the complexity of the land ownerships at Lillyhall, the ongoing management of open space is likely to be carried out by a combination of different companies. Areas associated with highways will ideally be adopted by the Local Authority;

Section 14 provides more detail in respect of future management regimes.

6.101 Broad management objectives include:

- **Enhancement of the existing landscape setting.** To maintain and develop the proposals for the landscape that help to integrate the development and the edges of the development in the broader landscape setting;

- **Nature Conservation and Biodiversity.** To create new and maintain existing habitats where appropriate in accordance with ecology recommendations;

- **Ensure on-going maintenance practices protect a high quality public realm.** To maintain a high quality external environment to provide recreational opportunities for workers, students and visitors; to ensure that the landscape is maintained so it attains its intended mature characteristics; to create an attractive and memorable landscape structure which will reinforce a high quality appearance across Lillyhall and aid wayfinding, and to provide a pleasing, attractive setting for all occupants; and

- **Maintaining a safe environment.** To ensure that a comfortable and safe environment...
is maintained for all users. This will include, amongst other things, ensuring that good natural surveillance is achieved and maintained, footpaths and cycleways are not blocked, overhanging trees and planting are controlled, and lighting is well maintained.

6.102. A variety of management regimes will need to be employed to maintain the range of landscape characteristics described in the above strategy. The types of planting (and their maintenance requirements) broadly fall under the following headings:

- **Existing landscape and structural planting**: This will include the maintenance of wooded areas, existing established hedgerows and grasslands. These areas should be enhanced and protected, subject to a suitable management plan based on recommendations from ecologists. Generally, all trees would be subject to a watching brief to determine their safety and life expectancy. Dangerous branches and trees would be removed as appropriate, thinning should be considered on a minimum of a 10 year cycle.

  Hedge and shrubs should be trimmed annually to maintain a good shape. Pruning should take place outside the nesting season in September – March. Any work required within the nesting season will require a visual check and potentially ecological advice, no work should be carried out where nesting birds are found. Grasslands should be maintained in line with appropriate ecological advice which would be covered in a long-term ecological management plan for the whole area as explained in the Ecology section of this report.

- **Formal landscapes**: Formal landscape elements in public open spaces and high-profile entrance spaces will require regular on-going maintenance to preserve the integrity and quality of the design. Grass areas will require the application of fertilisers in the first two years along with regular cutting and watering through the summer months. Formal shrub planting should be checked and where appropriate maintained on a monthly basis. Areas around planting should be weed free and mulch should be topped up regularly to suppress weeds. Plants should be pruned appropriately for their species, to encourage new growth, maintain good shape and minimise any security issues. Hedges, individual trees and new woodlands should be maintained by the landscape contractors implementing the works for a minimum of three years and should tie in with the defects liability period and likely planning conditions where appropriate. All hard landscape elements including seating, surface materials and lighting should fall under a watching brief and be repaired as and when necessary – this, and their lifespans, will of course vary depending on the quality of the products chosen.

- **Informal and natural landscape characteristics**: Softer natural landscapes can require the same level of maintenance as formal manicured environments. These areas should be subject to a robust long-term management plan, as set out above which is likely to recommend the progressive introduction of appropriate species. This plan should be prepared by landscape designers and ecological consultants. New woodland and individual tree planting should be carefully maintained to encourage establishment and diversity. Aggressive and competitive plants should be excluded and thinning should be undertaken as necessary. Trees should also be subject to the general principles of good tree planting, which can often be overlooked, including ensuring trees are growing true and are well planted and that ties, stakes and guards are removed once not required. Grasslands should be carefully managed in line with appropriate ecological advice, and
7.0 The Design Framework
Introduction

7.1. The foundation of the Lillyhall Masterplan is based upon current best practice in design and planning policy guidance, in particular that which is integral to the Government’s Sustainable Communities agenda:

‘Good design ensures attractive, useable, durable and adaptable places and is a key element in achieving sustainable development. Good design is indivisible from good planning’ (PPS1-Delivering Sustainable Development, ODPM 2005).

7.2. Whilst it is recognised that the primary purpose of Lillyhall is to provide a range of employment development, the majority of which will be of an industrial nature (Planning Use Classes B2 and B8), along with a certain amount of B1 development, this does not mean that high quality and responsive design cannot be achieved. Given the right setting and precedent, Lillyhall can be recognised regionally as a destination of choice as the Masterplan phases are delivered. It already has good links to the rest of the region, therefore by ensuring high quality design in the right locations, it can capitalise upon a range of investment on a broad scale, including energy and education-based uses which will generate community interest, and in turn raise the profile of Lillyhall.

7.3. The Government’s stance on the importance of good design is supported by detailed policy and the production of associated guidance including: PPS1 (Delivering Sustainable Development), PPG17 (Open Space), PPS22 (Renewable Energy), The Urban Design Compendium (English Partnerships / Housing Corporation, 2007); and ‘By Design’ – Urban Design in the Planning System: Towards Better Practice (ODPM / CABE, 2000). In addition NWDA’s Sustainable Buildings Policy has been incorporated into this guidance.

7.4. What constitutes good design is perhaps best summarised within ‘By Design’. It sets out seven design objectives as follows:

- **Character**: A place with its own identity;
- **Continuity and enclosure**: A place where public and private spaces are clearly distinguished;
- **Quality and the public realm**: A place with attractive and successful outdoor areas;
- **Ease of movement**: A place that is easy to get to and move through;
- **Legibility**: A place that has a clear image and is easy to understand;
- **Adaptability**: A place that can change easily; and
- **Diversity**: A place with variety and choice.

7.5. In terms of detailed best practice guidance on more specific issues such as crime and movement, Safer Places: The Planning System and Crime Prevention (ODPM, 2004), Secured by Design (ACPO, 2004), and Manual for Streets (DfT, 2007) consist of key design rationale, which will have a particular bearing on the creating and rejuvenating of key routes.

7.6. Of particular relevance, are principles laid out in Secured by Design which look towards creating safe, accessible and engaging places – key to the vision for Lillyhall. The key principles can be summarised as follows and have been incorporated into the Masterplan:

- **Integrated approach** – ensure that all significant components of its design, planning and layout are considered together at an early stage;
- **Environmental quality and sense of ownership** – well designed, attractive, clearly defined and well-maintained spaces are more likely to encourage people to take pride in their surroundings. In addition, feelings of comfort and safety will tend to lead towards a sense of shared ownership and responsibility;
- **Natural surveillance** – ensure that spaces around buildings, footpath routes, open spaces and parking areas are open to view from adjoining occupied properties. Well-trafficked routes can assist in discouraging criminal activity, by increasing the risk of detection, reducing opportunities for crime and making potential offenders feel more vulnerable, and
- **Lighting** – ensure that appropriate lighting is positioned for maximum security but respects the character of the area.

7.7. ‘Rethinking Construction’ principles should also be incorporated into the future development of Lillyhall. These are aimed at delivering improvements in the way that the construction industry works and helping it achieve its full potential. The principles were launched following the report of the Construction Task Force, chaired by Sir John Egan, in 1998. Outputs from the ‘Rethinking the Construction Client’ national debate that took place in 2001 identified six guidelines which are set out below:

- **Traditional processes of selection should be radically changed because they do not lead to best value;**
- **An integrated team, which includes the client, should be formed before design and maintained throughout delivery;**
07
The Design Framework

- Contracts should lead to mutual benefit for all parties and be based on a target and whole life cost approach;
- Suppliers should be selected by Best Value and not by lowest price; this can be achieved within EU and central government procurement guidelines;
- Performance measurement should be used to underpin continuous improvement within a collaborative working process; and
- Culture and processes should be changed so that collaborative rather than confrontational working is achieved.

Design Principles

7.8. The Vision for Lillyhall incorporates a number of key principles which are reflected in the Masterplan, as shown in figure 7.1 overleaf. Aspirational images have been included in this section to demonstrate the quality, style and scale of built form which could be appropriate (examples that are over 3 storeys have been included to illustrate overall design quality and variety in the treatment of elevations). The principles also reflect key policy and best practice guidance.

Transform key gateways with landmark buildings to generate sense of arrival

7.9. There are five key gateways within Lillyhall (see figure 7.1) and these should be marked with high quality buildings and associated public realm. The gateways are located as follows:
- Crossing point of the north western boundary/A596;
- Junction of the A595 and the A596;
- Junction of Branthwaite Road and the A595;
- Junction of the new by-pass with A595/A597; and
- Crossing point of the north western boundary and Branthwaite Road.

7.10. Landmark buildings in relation to these gateways should be 3 storeys in height to emphasise a sense of arrival and aid legibility. They should also, as with other buildings which contribute to the gateway areas, have main entrances or active ground floor uses onto the main thoroughfares.

7.11. It is not intended that the existing pyramid art work present on the A595 / Branthwaite Road is removed; however, the branding proposals should be extended and applied to this key gateway in order to realise the desired Lillyhall identity. Likewise the art work and branding should be applied to other gateways including new roundabouts such as the A595 / A596 roundabout that will help to achieve a consistency of approach.
Figure 7.1: Design Principles Plan
7.12. Other minor gateway locations such as the A597 Harrington Road, and the north eastern corner of Lillyhall, will also need to be treated similarly in design terms to contribute to high quality design standards.

Ensure routes and spaces are animated with active built frontages

7.13. In order to ensure a defined structure to routes and gateway locations, the position of building frontages is crucial. The Design Principles Plan (figure 7.1) highlights primary routes within Lillyhall where particular attention must be paid to ensure that roads are activated with building frontages (not car parking, storage space or servicing). These are principally along the A595, A596 and Branthwaite Road. The building line established by these key frontages should be respected by remaining development but not necessarily followed stringently, particularly within more industrial areas.

Create a legible hierarchy of key routes and spaces with connections to the wider context

7.14. There are several route typologies proposed within Lillyhall to ensure that uses are accessible and safe (refer to figure 6.17 – landscape plan and associated text). The Green Loop is a key movement corridor which links to the primary and secondary vehicular route network and provides amenity to those using the site as a shared resource. The hierarchy of spaces which relates to this network is indicated as follows:

- Education area – Activity / social;
- Local Hub – Break out / seating / lunch;
- Employment (lighter industry) – Relief in more dense areas of development / lunch seating; and
- Natural Areas – Informal relief / passive human activity / wildlife.

7.15. The transition between different routes within the movement hierarchy will be key to ensuring legibility, usability and safety.
Ensure different uses are located carefully to maximise compatibility and investment potential

7.16. The Masterplan defines a broad approach to land use. Within this overall approach the mix of different uses must be responsive to the relative fit of compatible / diverse uses. Where appropriate, the amenity of different users should be protected by way of location and appropriate landscaped buffering as necessary.

Enhance safety and security

7.17. Spaces and routes should be well overlooked, and have good lighting and clear definition between public and private space. Natural surveillance derived through new building frontages will be an important contribution to this design principle. In addition, generating activity along key routes, for example the Local Hub, will facilitate the reduction in fear of crime particularly after ‘office hours’. The Security Framework section of this report sets out further information.
Integrate a sustainable transport network suitable for a range of travel modes

7.18. The Green Loop and its connections to the wider context should ensure that foot, cycle and bus access is enhanced. The transition between the primary and secondary routes and the Green Loop, together with associated footpath/cycle ways, should be distinctive to ensure legibility and safety (use of materials, for example).

Showcase innovative sustainable technology within buildings and spaces

7.19. New buildings should be encouraged to reach BREEAM rating Excellent – for developments that have NWDA’s involvement this will be mandatory. All new development should utilise NWDA’s Sustainable Building Policy and Checklist to ensure that an integrated approach to delivering sustainability is achieved.

7.20. It is proposed that Lillyhall contains a series of spaces which will contribute to its sustainability, including reed beds that will feed into a Sustainable Urban Drainage (SUDs) system (as identified in Lillyhall West). SUDs will also provide aesthetic interest linking into the green space network.

CHP is also proposed to contribute to sustainable energy generation. The ‘Renewables’ theme and waste management could form a key part of Lillyhall’s sustainability credentials in the future. The renewables area (Alcan site/Lillyhall South) could also include public/private recycling facilities along with an interpretation centre linked to research into new sustainable technologies.

An example of such a facility is the New and Renewables Energy Centre (NaREC) in Blyth, Northumberland. Further information on NaREC can be found at www.narec.co.uk.
Sustainability

Background

7.21. One of the key aims of the Masterplan is to address the issues that contributed to the area having an uncertain and unsustainable future. These issues cross economic, environmental and social themes and are set out in the Phase 1 Report. In terms of sustainability these include the under-use of resources including land and infrastructure, poor choice of travel mode, undeveloped green infrastructure and water and energy inefficiency.

7.22. The Masterplan seeks to address this range of issues in a balanced and coherent manner to create more sustainable development. The approach to achieving this is explained under the headings below.

Approach

7.23. Energy and water. A more sustainable approach to energy and water is sought in Lillyhall through several interventions. The provision of new buildings presents an opportunity to develop these using more advanced energy and water efficient technology than at present. Buildings that are due to remain should also be refurbished to promote energy and water efficiency. The levels of new-build development offers the opportunity to connect these buildings into a CHP network allowing them to use thermal energy produced in the generation of electrical energy. The Masterplan accommodates space for a CHP plant at the heart of new development (in the vicinity of the Alcan site), which will promote efficient utilisation of thermal energy by local users. There should be some flexibility in fuel used by the CHP plant, as currently the use of biomass may be considered to be unfeasible. However, once biomass is a more mature fuel in the UK, there could be scope to use this rather than gas, which will help Lillyhall to be more sustainable.

7.24. At the building scale, the use of other renewable energy sources should be considered, including solar photovoltaics, solar thermal, ground source heat pumps, air source heat pumps and wind energy. Whilst some of these are emerging technologies in mainstream building projects, their use and cost efficiency will only increase over time and should therefore be encouraged.

7.25. Energy Efficiency. The identity of Lillyhall should be driven by energy efficient design, with buildings and spaces developed to maximise all available sources of sustainable energy as set out above. This includes sourcing local materials and ensuring that the orientation of buildings and spaces maximise heat and light from the sun, contributing to the local eco-system by use of green roofs, rainwater harvesting, tree planting and greenspace creation, and ensuring there is easy and safe access to pedestrian, cycle and bus links. Principles and performance indicators within NWDA Sustainable Buildings Policy should be followed wherever possible.

7.26. Design quality. Significant new-build development and public realm offer the greatest opportunity to improve the design quality, together with improvements to retained buildings. It is critical that these opportunities are taken, as high design quality will raise the profile of the area and attract investment, a crucial part of securing an economically sustainable development allowing investment in other elements of sustainability, such as energy efficiency and renewables, to be funded.

7.27. Green and blue infrastructure. Green and blue (water) space is a major land use in the Masterplan. Green space is an essential part of a sustainable development and can provide benefits on many levels; this is reflected in the Masterplan. To achieve multiple benefits, proposed green space is multifunctional. Areas of green space are distributed across Lillyhall, providing good access for recreational use by occupiers, workers and visitors. A good distribution of green space and the use of street trees and vegetation also play an important role in providing urban cooling, sustainable drainage and space for ecology from which the whole business, educational and local residential communities can benefit. In addition, existing green and blue areas that provide mature green infrastructure and good habitats for ecology have been retained for maximum ecological and drainage benefits.

7.28. Sustainable transport. Several elements of the design of the Masterplan contribute to promoting use of sustainable transport modes. Land uses and services have been distributed to ensure minimum distance between services and users. The network of pathways has been designed to promote direct access to services and land uses attractive to pedestrians and cyclists. This includes traffic-free cycle routes, new pedestrian crossings and the enhancement of existing routes. A key element of this is the provision of the new bridge over the A595, which provides a more attractive link over this busy road that currently acts as a barrier. In terms of strategic transport, the Masterplan includes a...
new bus route through the site with stopping points, which will provide a more frequent service to Lillyhall from neighbouring towns. In considering the sustainability of the area it is important to consider long term changes. In line with best practice across the Country, the Masterplan accommodates and protects the historic alignment of a railway spur that connects to the Barrow – Carlisle coastal railway, allowing its future re-opening should that ever become a viable transport option – this will depend on users at Lillyhall.

Mixed uses: The Masterplan seeks to accommodate a more varied mix of land uses than the current offer. This includes employment (warehousing and distribution, light industrial), office, retail (mostly car showroom but also retail provision for local needs), hotel, education, workshops, managed workspace and student accommodation, as well as supporting local services. This will ensure the area is better equipped for changing economic circumstances and will be able to attract investment from a more varied range of sectors.

Supporting services: The Masterplan includes supporting services in the Local Hub such as hot food retail, convenience retail, a crèche and health club, plus upper level service office space. There is also the potential for ancillary pub / restaurant facilities as part of a hotel as well as a petrol filling station at Lillyhall North. These are particularly important in the context of ensuring the area is self-sustaining and does not rely on neighbouring centres for basic needs hence reducing travel demand.

Local businesses and community are an important resource in developing a strong, economic and social base from which the area can grow – this is also borne out in relation to the Phase 1 Lillyhall Business Survey. Existing businesses are retained in the Masterplan, either by keeping existing buildings or providing suitable new premises for their relocation in accordance with the outcomes of the survey work. Opportunity has also been taken to allow existing businesses to grow by providing an appropriate range of accommodation. Lillyhall’s location is currently under-exploited in terms of its attractive surrounding landscape and views. The Masterplan maximises views of the Lake District to the east and Solway Firth to the west through orientation and massing of buildings.

Building on wider initiatives: The Masterplan seeks to provide accommodation for local businesses not currently located at Lillyhall. This will strengthen Lillyhall’s local economic base, and retain expenditure within the area. In addition, the Masterplan seeks to maximise the benefits of Britain’s Energy Coast Masterplan, and this strong local relationship is more likely to contribute to a sustainable future for Lillyhall as it is a high-profile national and regional initiative. This has been enhanced with the potential for a Renewables Interpretation Centre, which could be led by a company such as NAREC (see 7.20).

Progressive pathway to Carbon, Waste and Water

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Sustainable Buildings Policy has been developed to set the standard for commercial developments in the Northwest and to meet the challenges of climate change.

7.34. The policy was approved by NWDA Board in May 2007 for all new-build and major refurbishment projects over £500,000 on NWDA-owned land or receiving NWDA funding. The implementation of the policy is supported by the Sustainable Buildings Guidance Note and provides a series of mandatory primary and secondary Key Performance Indicators (KPIs), which are applied depending on the total cost of the development. In terms of the Primary KPIs, the BREEAM rating of Excellent should be applied to all new buildings, and Very Good rating for major refurbishment projects.
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All developments should strive to achieve Excellent which will be demonstrated through pre- and post-construction BREEAM assessments. In addition, a progressive pathway has been applied to Carbon, Waste and Water, culminating in zero carbon, waste and water by 2020.

7.35. The secondary KPIs apply to projects to a varying degree depending on their type and scale, and do not solely relate to the energy efficiency of individual buildings. They have been integrated into the Masterplan proposals where possible and are as follows:

- **Transport** – to support a reduction in the reliance on car travel and provide the facilities and opportunities for the provision of walking, cycling and public transport;
- **Communities** – to ensure that sustainable development considers both the communities and the local context in which it will exist, instilling best practice in the design and actual construction of developments;
- **Employment & Training** – to ensure large-scale investment in development supports the goals of the Regional Economic Strategy and supports opportunities for the unemployed as well as training initiatives;
- **Business** – to ensure large-scale investment in development supports regional supply chains and the environmental technology in the Northwest;
- **Place Shaping** – to ensure developments enhance a sense of place and respond to climate change issues, and the increasing frequency of extreme weather events such as warmer summers and heavier rainfall;
- **Whole Life Value** – in harmony with Office of Government Commerce guidelines, it is essential that clients and developers consider the whole life costs of buildings. This will include identifying the saving in energy costs that will arise from enhanced energy efficiency measures; and
- **User Satisfaction** – to ensure that feedback on a building’s performance in use can be considered – solutions will not be sustainable if user comfort levels fall below acceptable standards.

7.36. The NWDA Sustainability Checklist has also formed a key reference point for the development of the Masterplan from inception to detail, and should be used to measure forthcoming proposals for development at Lillyhall. This checklist represents the national sustainability agenda and includes the following main headings:

- **Climate Change**;
- **Place making**;
- **Community**;
- **Transport**;
- **Ecology**;
- **Resources**;
- **Business**;
- **Buildings**.

**Emerging Sustainability Guidance**

7.37. It is important to maintain the commitment to sustainability in the Masterplan through the detailed design of the phases or buildings. As well as creating a more attractive development that people will want to locate to, work in and use, the elements of the Masterplan that contribute to its sustainability will help ensure this commitment over its 20 year lifetime. It will therefore be well equipped to meet the recent and emerging demands of sustainability policy and building regulations. These include:

- **Building Regulations Part L2** – Due in 2010, will improve building energy consumption requirements;
- **Carbon Reduction Commitment** – Due in 2010;
- **BREEAM Excellent** is already required for many public buildings;
- **10% renewables** – The North West Plan now requires 10% of energy for a building to be from renewable sources for new developments over 1000 sqm; and

7.38. By retaining, enhancing and developing the sustainable elements of the Masterplan, individual developments will be far better positioned to meet these standards in an effective and economic manner reinforcing the overall strategic benefits for Lillyhall.
8.0 Transport and Movement Framework
Introduction

8.1. The main purpose of this section of the report is to assess the traffic impacts of the Masterplan on the local highway network, and where necessary mitigate for those effects. It also explores the potential to reduce the number of car-based trips to Lillyhall and improve penetration by more sustainable modes of transport.

Transport Policy Review

8.2. Section 2 of the Phase 1 Report provided a detailed review of national, regional and local policy relating to Lillyhall and its surrounding area. In terms of transport and movement, the transport matters outlined below, which form part of the Allerdale Local Plan, are the most significant:

- The document explains “Full traffic impact assessment work should be carried out for allocations on the Lillyhall site, and further detailed work will need to be undertaken by the Highways Agency, to ensure traffic generated by the development can be safely accommodated on the A595 and A596 Trunk Roads, and the Highways Agency will seek the attachment of planning conditions relating to the phasing of development and the carrying out of such improvements.”

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8.4. In total the Masterplan proposes in the region of 200,000 sqm gross new floorspace, the majority of which consists of B1 offices and B2 / B8 general industry / warehousing / distribution. For the purposes of this section of the report, the Masterplan has been divided into 5 areas of key transport demand generation, and therefore excludes areas of less change or less demand generation. These areas are shown at figure 8.1.

8.5. Area 1 is located to the north-east side of Branthwaite Road and to the north-west of Lillyhall Roundabout and comprises B2 / B8 with some B1. Area 2 is located to the east of the Lillyhall Roundabout on previously undeveloped land, which comprises a mix of B1, B2 / B8, a hotel and restaurant, a Petrol Filling Station (FFS) and three car showrooms. Together, areas 1 and 2 make up Lillyhall North.

8.6. Area 3 is the largest area of development and is concentrated to the north-west of the A595, between the A596 and Branthwaite Road. Area 3 is home to the majority of the B1 uses at Lillyhall, and also includes the Local Hub to the north of the A595 / A596 roundabout, and will be referred to as Lillyhall West.

8.7. Area 4 is located to the west of the A596. It will comprise a mixture of managed workspace, green space and student accommodation. Area 5 is located at the southern tip of Lillyhall, and will comprise a mixture of B2 / B8, Green Space and a Renewable Energy Building. The south-eastern half of Lillyhall between the Lillyhall Roundabout and the A596 / A596 Roundabout to the south of the A595 is to include a series of B2 / B8 and B1 units.

8.8. The Masterplan includes several new vehicular access points and the upgrade of existing junctions. These junctions are outlined below and illustrated at figure 8.1:

- A new roundabout is proposed on the A595 to provide access to Area 3 / Lillyhall West;
- A new access roundabout is proposed on the A596 to provide access to Areas 3 and 4 to serve the student accommodation and Local Hub;
- Branthwaite Road / Jubilee Road priority junction to be upgraded to roundabout junction;
- Branthwaite Road / Blackwood Road priority junction to be upgraded to roundabout junction;
- A596 / Jubilee Road priority junction to be upgraded to roundabout junction;
- A596 / Branthwaite Road priority junction to be upgraded to roundabout junction;
- Joseph Noble Road / Unnamed Road priority junction east of Lillyhall Roundabout to be upgraded to roundabout junction; and
- Vehicular access from unnamed road to PFS.

8.9. The impact of junctions further beyond Lillyhall would be the subject of further detailed work. However, it is considered that adverse impacts could occur on the A595 from Pelican Garage in Whitehaven to the A595 / A66 junction at Cockermouth and within much of Workington. These junctions will need to be considered in a full Transport Assessment to support any future large scale planning applications. A broad estimate of £3m in cost has been identified for such works.
Transport and Movement Framework

8.10. The Masterplan includes lengths of new highway within Lillyhall. There is a new section of highway extending from the A595 / Energy Sector Roundabout into Area 3, which serves a new road intersecting with Blackwood Road. The Branthwaite Road / Jubilee Road Roundabout has an arm extending north-eastwards, where two new internal roads serve Area 1. Area 2 is to be built on previously undeveloped land and consequently the internal road layout within it is entirely new. Area 4 also includes new highway serving the Local Hub from Hallwood Road.

8.11. Pedestrian permeability will be greatly improved as a result of the Masterplan, with several new pedestrian accesses into Lillyhall West from the A595. There is also footway proposed from the A595 into areas of development either side of the carriageway to the north of Lillyhall Roundabout.

8.12. These are identified in figure 8.2.

8.13. The Phase 1 Report identified shortcomings in connectivity between different areas of Lillyhall and the severance created by the lack of existing crossing points on the A595. The report also highlighted the poor pedestrian and cycle permeability into different areas of Lillyhall, in particular the lack of pedestrian / cycle routes extending from the A595. The Masterplan layout seeks to address these issues.

8.14. There are several crossing points proposed as part of the Masterplan, which are designed to improve connectivity between different areas of Lillyhall. A foot / cycle bridge is proposed across the A596 located in the middle of the A595 as it runs through Lillyhall. The bridge will greatly enhance pedestrian and cycle movement across the A595 into Area 3 and beyond that towards the Hub. A Pelican Crossing is proposed across the A596 between Lillyhall West and the student accommodation, which will also assist safe access toward the Local Hub. A pedestrian refuge island is proposed on the A595 north of the Lillyhall Roundabout to assist pedestrians crossing. Similar facilities will be introduced at Lillyhall Roundabout.

8.15. It is also proposed that the traffic-free cycleway along the north side of the A595 is extended southwards to connect with National Cycleway, therefore providing a continuous cycle route between Lillyhall, Distington, Porton, Whitehaven and to some extent Workington. This will allow easier commuting to Lillyhall by bike.

8.16. The Masterplan proposes 5,115 parking spaces. This has been calculated broadly in accordance with Cumbria County Council’s maximum parking standards and Lake District Joint Structure Plan 2001 – 2016: Deposit Plan. The maximum parking standard of 1 space per 35sqm for B1 Business – Business Parks has been applied to the Business Park element of the development and the level of parking adheres to the regional parking standards. B2 General Industrial and B8 Storage and Distribution has a maximum parking standard of 1 space per 45sqm, the B2/B8 General Industrial element of the development adheres to this standard with around 1 space per 60sqm. These two land-uses represent the majority of development and parking levels would be finalised at a detailed planning stage so no more information on car parking is required at this stage. The parking provision also adheres to the maximum parking standards outlined in The North West of England Plan Regional Spatial Strategy to 2021.

8.17. It should however be recognised that even with the proposed public transport and travel plan related improvements, dependency on car travel is likely to remain relatively high in this rural location. Restricting parking numbers in development proposals is therefore likely to detract from the attractiveness of the site to developers and investors. These two competing elements, as always, need to be balanced to provide sufficient parking whilst not over-providing spaces that will not help in encouraging people to make more sustainable transport choices.

8.18. At this stage of the Masterplanning the numbers of disabled, motorcycle and cycle parking spaces are yet to be finalised, though they should adhere to the relevant national and local guidance at the time of planning applications coming forward. Currently these require 3% of parking to be allowed for disabled users, with 5% for motorcycles and 10% for bikes.

8.19. It is proposed that six existing bus stops at Lillyhall are upgraded with new seating, lighting, display boards and bus boarders provided. In addition, two new stops are to be provided on Blackwood Road. This would be financed either directly through the County Council as the body responsible for public transport, with the bus operators or through S106 contributions. Bus accessibility to the site will be discussed in more detail later in this section.
Figure 8.2: Transport and Movement Strategy
Trip Generation

8.20. The current version of the Trip Rate Information Computer System Database (TRICS 2008(B)) has been used to derive appropriate vehicle trip generation rates to predict the traffic flows generated by the different elements of the Masterplan. To ensure a robust assessment, 85th percentile rates have been used. As a result the predicted flows are unlikely to be exceeded rather than those expected to occur.

8.21. Further information is set out in Appendix 3. The results of this work have informed the detail of the Transport and Movement Framework, ensuring that the movement network is designed at sufficient capacity to accommodate projected traffic flows. The appendix includes the traffic flow diagrams which illustrate the volumes of traffic on the network in different peaks and scenarios.

8.22. The extent of highway improvements is determined by the capacity at each of the junctions assessed, which in turn determined by the level of development traffic, the turning proportions of development traffic and the existing capacity at each junction. The traffic flow diagrams show that at some links in 2021 (AM and PM, 2021 has been chosen as a period 10 years after development commences, assumed 2011) incorporating development traffic scenarios, new development traffic will account for half of the overall traffic. However, similar increases in traffic at different junctions does not mean that similar levels of highway improvements are required at each junction. If one junction is close to capacity in a ‘No Development’ scenario then it will require more highway improvements as is the case with the A595 / A596 Roundabout, which has less existing capacity than the Lillyhall Roundabout. Turning proportions of traffic (determined by the assignment of traffic) also affects the level of mitigation required, where there are large opposing movements (right-turns out will delay right-turns in), larger queues are generated which reduces capacity at a junction. It is the models that determine the extent of highway improvements required, considering flows, proportions and geometries.

Accessibility and Mode Share

8.23. As discussed above, the proposed development will incorporate several new pedestrian and cycle links, as shown at figure 7.2. The plan shows several of the main pedestrian routes facilitated by new crossing points on the A595 and A596, as well as the extension of the traffic-free route running alongside the A595 to connect with National Cycle Route.

8.24. The Phase 1 Report identified that bus accessibility to the site is poor, with only one high frequency route (Stagecoach 300) serving the far south of Lillyhall along the A597. Given this existing shortfall in bus accessibility, future development will have to fund new routes to the site for example through pump priming new services from S106 contributions or other financial sources (see Delivery and Funding section).

8.25. Consultation has been sought with Stagecoach and CCC’s Public Transport Team regarding the provision of more frequent services and more direct service routes to Lillyhall which offer wider site coverage. Stagecoach explained that there was potential to increase the frequency of the existing 300 service from hourly to half-hourly and increase its route to cover Blackwood Road.

8.26. The increased frequency of the 300 service would benefit Lillyhall during the early stages of development but later phasing of development will result in more employees on site (around 5,000 on the basis of different employee densities for each land-use) and the need for increased bus service provision to Lillyhall. It is proposed that new routes to the site from Workington and Whitehaven to serve the whole development are implemented. Appendix 4 shows different bus services for Lillyhall. It is envisaged one of them will need to be implemented. Service 1 provides new routes calling at residential areas between the site and Workington and Whitehaven. Service 2 looks to enhance the existing routes to those towns.

8.27. Service 1 includes two route options, Option 1 Route to Workington (via residential) and an Option 2 Route to Whitehaven (via residential). Service 2 includes one route option (Option 3 Route) to Workington and Whitehaven (town centre to town centre).

8.28. Either service will require initial pump priming as part of their set up while development is being undertaken – i.e. before there are sufficient passenger levels to support the wholly commercial operation of new services. Stagecoach has advised the subsidy will amount to £72,800 per bus per annum (at £1,400 per bus per week).

8.29. It is suggested in the early phases of development an hourly frequency should provide sufficient capacity, which for Service 1 requires one bus per route and for Service 2 requires one bus. The respective pump priming will therefore be £145,600 per annum for Service 1 and £72,800 per annum for Service 2. The period of subsidy will mainly be determined by the rate at
which development in undertaken and therefore the rate at which passenger levels are likely to rise, however for the purposes of this Masterplan this has been identified as a 5 year period which is felt appropriate for this scale of development. The costs for this are identified solely in phase 1 to enable the network to be improved at an early stage and to help influence people’s travel patterns at the earliest opportunity.

8.30. After the initial phases, the extended development at Lillyhall will require any new services to operate more frequent buses and thus increase their capacity, and perhaps amend their routes to penetrate further into Lillyhall, depending on areas of highest user density, which will in turn depend on occupier location. This would be subject of more detailed Transport Assessment work. It is therefore also suggested that towards the completion of development and assuming a 10% to 15% bus mode share among employees (500-750 employees), a 10 minute or 15 minute frequency will be required to provide sufficient capacity at times of peak demand, which will of course depend on the new occupiers and their working hours. By this stage the services should fund themselves via the fare box.

8.31. As explained above, the 6 existing bus stops at Lillyhall and the two proposed bus stops require standard bus shelter specifications, which include seating, lighting and display boards with a bus boarder and power supply. Bus pull-in lay-bys are not necessary, kerbside stops will be sufficient. It would be beneficial to link to the Lillyhall brand in the design of these facilities. It is recommended that contributions towards these works are sought from developers through S106 agreements with more information provided in the delivery section of this report. The total cost of these upgrades, would be in the region of £25,000 for each shelter and therefore a total outlay of £200,000.

8.32. A ‘Lillyhall Travel Plan’ should be developed to reduce the reliance on the car throughout Lillyhall. As part of negotiating lease agreements with businesses on NWDA owned land, NWDA should insist end users implement their own Travel Plan, (this could also be achieved through planning condition) sitting under the overall / ‘umbrella’ Travel Plan. A designated Travel Plan Co-ordinator should be appointed as part of Lillyhall’s overall management who would be responsible for the Travel Plan’s development, implementation and day-to-day running as well as supporting smaller businesses implement agreed measures on their sites. Achieving “buy-in” from long standing occupiers or those over which NWDA has less influence would be achieved from the organisations delivering the Masterplan / managing Lillyhall (see section 14) working with such occupiers.

8.33. The development of a ‘Lillyhall Travel Plan’ would need to be based on a staff travel survey. The results of this survey will determine the measures to be implemented on site and act as a point of reference for subsequent monitoring surveys.

8.34. The Transport and Movement Strategy Plan (figure 7.2) shows several proposals which will improve pedestrian and cycle movement and accessibility to/ from and around Lillyhall. When the developers of each plot are confirmed, there will be an onus placed to provide secure, covered cycle parking in accordance with CCC policy.

8.35. The Travel Plan will make further recommendations to encourage more sustainable transport choices. Car sharing is often one of the most successful measures in reducing car travel demand. In order to promote car sharing, preferential spaces should be provided within the car parks on-site. A car share database should be set up for Lillyhall, so all employees who are interested in car sharing can register and enter their details (in particular home address and work hours) to enable the system to provide a car sharing match for them. If demand warrants it, the management company (see Delivery and Funding Section) could enroll in a car club, with the cost of membership passed onto business on site as part of negotiating lease agreements. These allow shared use of a pool of vehicles – see www.whizzgo.co.uk for example.

8.36. New recruits at places of work often reconsider their travel options and consequently the Travel Plan Co-ordinator will have the responsibility of influencing their travel behaviour by disseminating information regarding travel to work by more sustainable modes through individual companies.

8.37. The Travel Plan Co-ordinator will be responsible for the ongoing monitoring of the ‘Lillyhall Travel Plan’ which will involve the following:

- Initial baseline survey of staff travel;
- Bi-annual monitoring surveys to review targets and staff travel patterns;
- Continuous monitoring of vehicle trips to / from the site (e.g. carried out through Automatic Vehicle Counters on the accesses to the main 5 areas of development); and
Liaising with Officers at CCC over the development and progressing of the Travel Plan.

8.38. Realistic targets for mode-share change and a reduction in single occupancy trips should be established as part of the Site Travel Plan and then subsequent individual plans for each occupier.

Transport Conclusion

8.39. The main purpose of this section of the report is to provide a strategic overview of the transportation impacts and requirements of Lillyhall.

8.40. Lillyhall is a major development, which once fully built out will attract significant numbers of employees. To reduce the traffic impacts of the development, travel on foot, by bike and by public transport must be encouraged and promoted. Careful design of movement networks is necessary to enhance the walk and cycle routes. In addition the development will involve a significant financial commitment to provide direct and penetrating bus services. Despite these measures the development will generate high volumes of vehicle trips, which will require major highway mitigation works particularly on the A595 and the access points to the development plots.

8.41. With the above mitigation in place it is expected a planning application supported by a robust and comprehensive Transport Assessment should receive technical support from the Highway Officer of the Local Highways Authority and the Highways Agency.
9.0 Engineering
Utility Impact Issues

9.1. An assessment of the existing statutory utility infrastructure networks serving Lillyhall, which include gas, water, electricity, sewers, BT and various telecommunication providers, has been undertaken.

9.2. The assessment is based on a review of the received statutory record plans and details from the identified asset owners available at the time, in order that the existing situation can be established and future development constraints and design parameters can be identified. This has included an assessment of existing supply characteristics, locations, availability of supply to support development, points of connection and discharge, likely abnormal works and reinforcement measures.

9.3. Lillyhall is well served by a network of mains service infrastructure and public sewer drainage networks under the jurisdiction of the various asset owners. These details have been obtained and are identified on drawings and schedules within the Phase 1 Utility Assessment Report. This information has been utilised as baseline data to undertake further assessment and consultation with the relevant asset owners and service providers.

9.4. The assessment does not include the ‘private’ non-statutory supply, distribution and drainage provision for the individual properties as this information is not available. It is however recommended that the detailed investigation of the “developed plots” is undertaken to establish the previous and existing service infrastructure characteristics.

9.5. There are a number of key utility impact issues for the redevelopment proposals for Lillyhall based on the Masterplan which consist of:

- Existing network capacity to support development;
- Reinforcement / upgrade requirements;
- Impact on existing statutory utilities;
- Cost and programme of required reinforcements / upgrades of service infrastructure to suit the Masterplan. Detailed phasing of development proposals as they come forward will have a significant impact to these considerations;
- Network studies required by statutory undertakers as part of service assessments. (Due to the scope and complexity of the development proposals network studies are likely to be required for the electricity infrastructure);
- Third party land issues; and
- Assessment period for statutory undertakers to establish the network and supply implications. The statutory undertakers and asset owners are governed by regulator conditions (Ofgen) for the response and provision of supply and connection information. These conditions are subject to the complexity of the network conditions i.e. simple, complicated and complex, together with the receipt of sufficient and suitable baseline information such as service loads and development proposals, in order that supply details and / or additional studies can be established. For complex applications for electricity a response period of 90 working days (18 weeks) is allowed under regulator conditions, however this can be extended if further studies are deemed necessary by the host.

9.7. The statutory and non-statutory consultees primarily consist of:-
- United Utilities;
- EON;
- Core Utility Services;
- Northern Gas Networks;
- BT;
- Thus; and
- Atkins Communications.

9.8. The existing statutory utility and drainage networks that serve Lillyhall have been obtained and detailed in the Phase 1 Report and informs the likely infrastructure provision.

9.9. Due to the impact of the development proposals and the associated highway improvement works, it is likely that a number of existing utilities and sewers will be affected by the proposals and that protection and / or diversions measures will be necessary. Until precise details of these proposals are established and intrusive investigations carried out of the affected services it is recommended cost contingencies are allowed within the budget cost plan.

9.6. The Phase 1 assessment was undertaken in October 2008 and has been utilised as baseline information for the development of the Phase 2 studies. Consultation has been undertaken and initial responses received (see Appendix 5), however due to the complexity and scale of the masterplan these consultations will have to be re-visited at a later stage as proposals develop in order to arrive at a conclusive response from the relevant statutory and non-statutory undertakers and asset owners.
9.10. Each following section is supported by plans illustrating the proposals which are shown in Appendix 5. These show proposed infrastructure, and are based on the existing infrastructure networks as set out in the Phase 1 Report.

**Electricity**

9.11. An existing underground 33kv / 11kv HV (current High Voltage capacity loads) distribution network is routed around Lillyhall providing circuit linkage to the various on-site network and private distribution substations.

9.12. The HV distribution network intake is from the primary overhead grid to the north of Lillyhall adjacent to the A596.

9.13. Based on the complete 20 year Masterplan, a load assessment has been carried out and established a total electricity load requirement of 9.867 MVA (Megavolt amperes) (9,867 KVA, Kilovolt Amperes) based on peak loading.

9.14. Preliminary consultation with United Utilities has established the need for additional distribution mains to support the development proposals based on full development. This will include seven 1MVA substations and four 0.5MVA substations, as well as the refurbishment of two existing substations (at Alcan and at plot 23 on Lillyhall East) (see Appendices 5 and 7 for locations plot references). For isolated development and refurbishment of existing property to the south of the A595, direct LV (Low Voltage) connections from the existing network will be possible.

9.15. Due to the scale and complexity of the development proposals consultation is still ongoing with the relevant undertakers as the scheme is considered to be characterised as a ‘complex’ connection with a requirement for network studies, in order that budgetary estimates for supply, Point of Connection (POC) and reinforcement can be established. United Utilities have provided an initial response. EON’s response is still awaited.

9.16. United Utilities (Ref Y20407 dated 22nd June 2009, Appendix 5) have confirmed that there is a 1.9MVA supply off the existing HV network without the need for a Primary Substation. A detailed network study would be necessary for future phases which would be undertaken at the appropriate time.

**Water**

9.17. An existing underground trunk and distribution main network is routed around Lillyhall providing supplies to the existing facilities.

9.18. Preliminary consultation with United Utilities has established the need for additional distribution mains to support the development proposals, with new connections taken from both existing and new mains.

**Gas**

9.19. An existing underground Medium Pressure (MP) and Low Pressure (LP) distribution main network is routed around the estate providing supplies to the existing facilities.

9.20. Preliminary consultation with Northern Gas Networks has established the need for additional distribution mains to support the development proposals, with new connections taken from both existing and new mains.

**Telecommunications**

9.21. An existing underground and overhead BT network and THUS Communications underground network (FO) is routed around Lillyhall providing telecoms supply and connection to the existing facilities. Refer to drawing A049680/AC-2700 of the Phase 1 assessment for the existing networks.

9.22. The existing education facilities are well served with ICT provision from the existing THUS and BT underground fibre networks.

9.23. A total 100MB bandwidth fibre connection is provided that is equally shared (50MB each) on separate and independent networks. The UOC has additional ADSL resilient connections.

9.24. The internal distribution for UOC is based on a fully managed pervasive wireless (LAN) network with desktop ports providing high speed internet connection.

9.25. It is understood that future expansion of the education facilities ICT networks would require reinforcement of the existing underground fibre networks and/or linkage to the existing radio mast some 100m to the west of Lillyhall.

9.26. As part of any future enhancement and
development the existing network providers will be requested to incorporate/make provision for additional underground ducted networks within the service corridors to roads between existing and proposed facilities to allow for future ICT and telecommunications provision.

9.27. It is therefore recommended for the masterplan development proposals that a ducted network of infrastructure and service corridors is provided for throughout Lillyhall for ‘traditional’ telecoms networks together with dedicated ICT provision. The detail and specification are largely unknown at present as this will be dependant on the end user requirements and existing network and capacity assessments undertaken by the relevant providers.

Surface Water Sewers

9.28. An existing gravity surface water sewer system exists within the main highways.

9.29. Generally the flows are routed in a south west direction with ultimate discharge to Distington Beck.

9.30. Within Phase 1 the only development land which would require a pumping station is the land to NE of existing roundabout and this would only be a foul station. SW would drain by gravity. The remainder of the phase 1 plots would initially connect to the existing sewer networks or if distance/depth was unsuitable would be via a private package pumping station within each plot. Obviously this is very much subject to detailed design. The remaining implementation would follow the phased build out programme.

9.31. Due to the limitations for discharge of surface water that will be imposed by the asset owner an allowance for on-site attenuation has been established based on 15l/s/ha which equates to 90 sqm per hectare of surface water ‘storage’ that can be provided by open water features, underground tank systems or a combination of the two with ‘hydrobrake’ type outflow control prior to discharge to the receiving sewer network. Reference should also be made to the Flood Risk section of this report.

Foul Sewers

9.32. An existing gravity foul sewer system exists within the main estate highways.

9.33. Generally the flows are routed in a south west direction with ultimate discharge to Distington sewage treatment works.

9.34. Within Phase 1 the only development land which would require a pumping station is the land to NE of existing roundabout and this would only be a foul station. SW would drain by gravity. The remainder of the phase 1 plots would initially connect to the existing sewer networks or if distance/depth was unsuitable would be via a private package pumping station within each plot. Obviously this is very much subject to detailed design. The remaining implementation would follow the phased build out programme.

Utility Key Issues

9.35. At present, consultation is still ongoing with the regulatory and non-regulatory undertakers to establish service availability, points of connection, reinforcement, programme and budgetary costings for supplies of gas, water, electricity, telecoms and foul and surface water drainage. This is due to the complexity of the development proposals and the regulator governed consultation periods allowed together with identification of asset studies that are necessary.

9.36. The key issues which require further detailed consideration and assessment as the Masterplan and scheme delivery develops are:-

- Surveys to establish precise locations of existing utilities that maybe affected by the development proposals and identified highway improvement measures. It should be noted that locations shown in this report are indicative, and that actual routes, depths etc which will determine diversion / protection measures can only be established by survey and intrusive investigation;
- Third party issues, such as the re-routing of new services under land that is in third party ownership;
- Legal status of existing utilities and drainage networks. Whilst all existing services / utilities indicated on the plans included in this report and its appendices are under the jurisdiction of the relevant statutory bodies with respective access rights / easement / wayleaves, it remains important to have these matters verified by a legal team prior to development;
- Network studies that maybe required by the statutory bodies to assess existing load profiles, availability, points of connection and reinforcement. Due to the fluctuating nature of the utility infrastructure networks this may vary at the time of formal application and based on the load applied for. Formal application to a number of Multi-Utility providers for provision of utility connections was made in April 2009, (following on-going liaison during Phase 1 work and the finalisation of the Masterplan and establishment of load profiles for the utilities), and will be reported when received (Appendix 5);
Variation to the proposals and development programme and phasing will have a significant impact on the supply, distribution and connection of electricity. This would require re-consultation with the undertakers and potentially extend the assessment period.

To date no surveys or investigations or establishment of existing conditions has been undertaken, that would cover existing ‘private; connections, supply and distribution from the statutory networks, as well as their capacity, condition, demand, termination and abandonments which would affect future servicing strategies. It is recommended that a detailed assessment is carried out of the existing facilities which would also then establish cost implications.

Conditional surveys or investigations of existing services and drainage networks that are to be retained for reuse or refurbishment; and

Programme for detailed response from the regulators, as reported earlier in this section.

Flood Risk

9.37. The Flood Risk Scoping Report (in the Phase 1 Report) considers flood risk and drainage information available in relation to Lillyhall. The report indicates the likely scope of works for a future Flood Risk Assessment (FRA) in accordance with current guidance. The following conclusions are drawn from the work completed for the FRA Scoping:

- The vast majority of the site (97%) is shown on the Environment Agency’s (EA) flood risk map as lying in Flood Zone 1; outside the extent of the 0.1% (1 in 1000) risk of flooding from watercourses. 3% of the site, a small part of the southern end of the site, falls in Flood Zone 3 (see Phase 1 Report) (1 in 100 risk of flooding from watercourses, >1%);
- No other significant sources of flood risk were identified. However, given the site topography it is recommended that consideration be given to potential overland flow routes when planning new development;
- Overall, the site is therefore considered to be at low risk of flooding;
- The site is over 1 ha in size (160 ha in total), and therefore, based on EA Standing Advice, an FRA would be required for developments on this site;
- Owing to the low flood risk, and the location of the site mainly in Flood Zone 1, it is considered that the PPS25 Sequential Test would, in most cases be passed. The only exception would be certain developments in the Flood Zone 3 area to the south east;
- The 160 ha (approximately) development site will be a mixture of permeable and impermeable surfaces. If not managed properly, this could lead to increases in flood risk to the site itself and to other areas; and
- The site is well served by public sewers. Any discharge of surface water to the sewer network will require UU’s agreement. See also comments under connectivity surveys, below.

9.38. Regarding submission of planning applications for any future developments, the following recommendations are made from a flood risk point of view:

- It is recommended that a ground investigation, including soakaway testing, should be completed around the application area. This will help to establish if surface water from potential developments can be disposed of by infiltration techniques;
- If infiltration is not a viable option, surface water discharges from the site should discharge to local watercourse. Surface water discharge from future developments will need to be limited to rates agreed with Allerdale BC / EA (for discharge to watercourse) or UU / Allerdale BC and EA (for discharge to sewer). Consultation with these third parties needs to be carried out with the formal FRA reports and before any planning application is made;
- A drainage, connectivity and condition survey may be required by UU to establish the existing sewerage system and point of discharge from the site(s) into it;
- Surface water sewers will be required to control surface water runoff for the site. It is envisaged that the sewers will be designed to a 1 in 30 standard, in line with Sewers for Adoption requirements. Any future developments will require formal storage, and associated limitation of flows to the required runoff rate, to accommodate up to a 1 in 30 event (see Surface Water Sewers section of this report);
- Flows in excess of the 1 in 30 storm, up to the 1 in 100 event will need to be retained on site and attenuated to the specified rate (a development-specific FRA report will confirm that rate); and
- Consideration needs to be given to the area of site falling into Flood Zone 3. Part of this area is currently developed, and it is recommended that further development is avoided (or perhaps used as an open space / sports area or potentially car parking, subject to safe design), unless suitable mitigation measures are implemented in agreement with the EA.

Archaeology

9.39. The Phase 1 Report showed that the majority of the current buildings on the site are of modern provenance and of no significant archaeological
value. The study did, however, identify a number of buildings of potential archaeological interest. These sites are noted on the Cumbria Sites and Monuments Record (SMR) and include a factory building, Bombing Decoy and Iron Works, in the vicinity of the Alcan site, and the disused railway.

9.40. With regard to below ground archaeology, the location to the north east of Winscales Deserted Medieval Village, which Oxford Archaeology North attempted to locate in 2004, still constitutes a potential developmental risk in the northern portion of the site. However, substantial landscaping has taken place within this area and will have disturbed or destroyed any sensitive archaeological deposits. Indeed the development over the site since the late 1950’s will have, in the areas of current buildings, disturbed any in-situ archaeology. Potential preservation of archaeological deposits may survive within current buildings footprints such as below raft or similar foundations that have not proven too destructive.

9.41. Mark Brennand, Senior Historic Environment Officer at CCC, was approached for consultation regarding this archaeological assessment and the aforementioned sites. Mr Brennand stated that the bombing decoy would warrant further investigation and, where appropriate, recording if it was proved to be genuine and proposed for demolition. The area of the iron works would also need to be investigated as recommended in the stage 1 assessment. Mr Brennand also voiced his concerns that although absent from the current archaeological record, later prehistoric and Romano-British archaeology cannot be ruled out entirely, and that he may seek a planning condition requiring an evaluation on any proposed new development. This would be dependent upon the final size, location and design as indicated on the final Masterplan.

9.42. Regarding submission of a planning application for any future developments, the following recommendations are made, from an Archaeological point of view.

- Further consultation with Cumbria County Council’s planning archaeologist to agree a next stage of evaluation based on consideration of the planning application and any potential impact this may have on potential sub-surface archaeology as described in the Desk Based Assessment of the site;
- An archaeologist with a specialism in Industrial Archaeology be commissioned to carry out a level 2 building survey of structures of an industrial interest and associated with buildings 44, 47 and 16 (see Appendix 7 for locations) on the buildings assessment plan as noted in the Phase 1 Report, and
- The level 2 survey will consist primarily of photographs, ground plan phasing, description of each room and exterior, description of development and history. This should be undertaken using appropriate methods and practices which satisfy the stated aims of the project, and which comply with the Institute of Archaeologists (IFA) Code of conduct and agreed by the County Archaeologist in the form of a Written Scheme of Investigation (WSI). This level of survey should be applied to the vicinity of the Alcan site, which comprises a number of buildings and warehouses that date to the 1940’s including a so-called bombing decoy (building 44 on the Building Reference Plan, Appendix 7. Other important buildings are 47, 16 and the boundary wall). The majority of sheds visible at present are in actually the original buildings that have modern external sheeting. To the rear of the Alcan site there is an electricity sub-station that is a good example of a type dating to the post war period. The majority of the iron works and associated railway have been dismantled and little remains of either the buildings or the railway except for an example of the sidings. The hard standing of the iron works is visible.
10. Ecology
Environmental Impact Issues

10.1. Lillyhall occupies an area which is surrounded by open countryside and includes various landscaping schemes, which now provide wildlife corridors through and around the site, linking to adjacent habitats outside. Much of the undeveloped area is poorly drained and supports rush pasture and damp woodland or willow / alder carr. Some of the plantation woodlands are over 120 years old and support a characteristic woodland ground flora. Together, these vegetation types provide a diversity of wildlife habitats supporting a range of protected and Biodiversity Action Plan (BAP) species. More detailed protected species surveys would need to be carried out to establish the presence or likely absence, and location of protected species within the site and surrounding area as the Masterplan develops.

10.2. At the present time there are no statutorily designated sites within Lillyhall, however, the ‘hen harrier protection zone’ to its north and east has been afforded Special Protection Area (SPA) value by Natural England. The habitat sensitivity map developed within the Phase 1 Report is a working document and may change over time as the project develops and additional information on protected species is acquired. The Phase 1 Report gives guidance on the degree of mitigation which might be expected should these areas be developed. It provides an indication of the most important areas of habitat within the site which should be retained and / or enhanced, and those which are of a lower ecological value in this context. The Landscape Strategy set out earlier in this report takes these recommendations fully into consideration. Potential for protected species to be supported within certain habitats has been addressed in the Phase 1 Habitat Report, but no specific protected species surveys have been undertaken to date. These are likely to form part of individual planning applications.

10.3. Ecological constraints to development might arise owing to the presence of rare or protected species and / or habitats, or to the location of the site in relation to nature conservation sites of statutory and non-statutory nature conservation value. In the case of watercourses, developments can have an impact on aquatic ecology both within the site and much further downstream owing to possible water quality and / or hydrological changes caused by the development.

10.4. The main environmental constraints identified prior to the development of the Masterplan were:

- The ‘Raptor Sensitivity Zone’ (hen harrier protection zone) to the north and east of Lillyhall;
- UK and Cumbria BAP Priority Habitats of rush pasture, species-rich grassland, wet woodland and species-rich hedgerows;
- Potential presence of a wide variety of legally protected species, and UK and Cumbria BAP priority species.

10.5. Although there are a large number of potential constraints identified in the Phase 1 Report, the existing ecological status of the site, together with its location and layout, present a range of opportunities to enhance the existing ecological value within the new Masterplan and create new areas of habitat. These measures are strategic suggestions which aim to fulfil the Local Authority’s obligations to ensure that biodiversity is incorporated. However, the detailed proposals and the associated habitat and protected species surveys would need to be undertaken on each individual development plot as part of the planning process.

10.6. The existing ecological value of the site, its habitats, species and linkages to habitat outside the site, provide a network of wildlife habitats and corridors throughout the development that has been reinforced and enhanced as part of the Masterplan Strategy. This builds on the existing layout with broad bands of plantation woodlands and networks of open space.

10.7. Research into the mental and physical benefits of green surroundings for living and working has proved that these include reduced stress, cleaner air owing to filtration of pollutants in foliage, and opportunities for recreation such as walking, running, bird watching etc within the working day.

10.8. The key items of strategic ecological opportunities that have been incorporated into the Masterplan, as identified in the Landscape Strategy, include the following:

- Reinforcement of existing woodland belts using native, indigenous tree and shrub species and existing hedgerows to the site perimeter and along the sections of the main highway routes;
- Retention of existing good quality wet rush pasture as open habitat to the west of the site adjacent to the A596;
- Design and implementation of a network of ‘green routes’, with simple interpretation to inform and encourage respect of the natural environment and ecology;
- Retention of the area adjacent to the “Raptor Sensitivity Zone” as an undeveloped area of the site. The option of potential use for coppicing has
been withdrawn from the Masterplan due to likely environmental objection, although this specific use could be investigated further following the detailed survey of the use of this area by hen harriers and other protected raptor species;

• Retention of the Cumbria Wildlife Trust (CWT) area within the Alcan Site, known as the Alcan Wildlife Site, which includes marshy grassland, semi-improved grassland and scrub and four ponds which support palmate newts;

• Establishment of herb-rich grassland swathes adjacent to woodland belts, which are not mown regularly. Where there are wide bands of amenity grassland it would be possible to reduce the width of managed grassland and introduce fairly robust species of wild flower such as ox-eye daisy, knapweed, yellow rattle, and woodland edge species such as primroses, foxglove and red campion;

• Production of a long-term ecological management plan for the whole area;

• As the individual sections of the Masterplan are developed, more specific details could be incorporated to enhance the ecological aspects of the wider Masterplan. These items could include:
  • Installation of bat and bird boxes within the developed units and in woodland;
  • Provision of holes and perches for kingfishers;
  • Provision of perches for foraging raptors such as peregrine and kestrel;
  • Creation of additional ‘natural’ ponds suitable for great crested newts and other amphibians, dragonflies etc.;
  • Use of “brown” and / or “green” living roofs on buildings – these can increase local biodiversity by using a relatively infertile medium, encouraging colonization by a diverse range of plant species and hence rich invertebrate population;
  • Use vegetated architecture such as climbing plants and ‘green’ screens / living walls to provide additional habitat within the built environment – this might include use of geo-textile hangings, hydroponic walls, green bridges, and even edible vegetable / allotments;
  • Construction of water features within the built environment as part of the landscaping to attract species such as dragonflies and damselflies; and
  • Installation of a simple bird hide or observation area, in particular for watching foraging over the adjacent pastures (especially raptors, deer).
11. Planning Fit
Introduction

11.1. This section of the report sets out the Masterplan’s fit and status within the planning system, with options for how the document can be taken forward and used to influence development decisions made by the Local Planning Authorities (LPA).

Status

11.2. This report has been commissioned by NWDA and is ‘owned’ by it. Its development has been guided by a Steering Group, the members of which represent a number of organisations including ABC, CBC and CCC. Representatives (Officers) of the relevant LPAs have therefore been involved throughout the development of the Masterplan and have had the opportunity to comment upon it, during draft stages of both the Phase 1 and Phase 2 Reports, with their comments being fully considered.

11.3. The development of the Masterplan involved two wider stakeholder events – a full day workshop (as summarised in the Options Process section of this Report) and drop-in exhibition (reported in Appendix 10) where again comments were recorded and taken into consideration as the report progressed towards its finalisation.

11.4. Notwithstanding the above, the report has not been the subject of full public consultation, and can therefore hold little direct weight in the determination of planning applications.

11.5. It is also worth noting that much of the Masterplan, particularly proposals for Lillyhall North and the introduction of the Local Hub, are contrary to the adopted development plan; applications that comply with the Masterplan for such development would be considered as departures.

11.6. However, there is a case for the wider regenerative impact of proposals which would help to support such applications.

Future use of the Masterplan by NWDA

11.7. There are a number of ways in which this report can be used to help influence planning decisions. Set out below are measures in the short, medium and long term which will help to increase its status over time.

Short term

11.8. Agree with the LPA that applications coming forward within the Masterplan area are sent to NWDA as non-statutory consultees. NWDA would therefore be empowered to make responses to the LPA which may or may not support a particular application on the grounds that it would compromise the longer term implementation of the Masterplan. This would then be a consideration in the Planning Officer’s determination of the planning application, but is unlikely to hold significant weight – i.e. it is unlikely that this could be used as a sole reason for a recommendation for refusal.

11.9. With regard to applications that come forward on NWDA owned land, NWDA will have more influence over design, siting, costs etc. using this report, and particularly the Design Prospectus, to help influence investors, developers, architects etc.

11.10. The Design Prospectus includes a section on Design Guidance which outlines key principles and guidance for development proposals. As the content of this section does not include reference to land uses that may differ from the adopted development plan, the LPA can adopt this section of the Prospectus as a material planning consideration.

11.11. With particular reference to the level of enquiries coming forward for retail uses, particularly sandwich shops etc., a possibility would be to submit an outline application for the development of the Local Hub (this complies with the proposed phasing plan and discussions with the key third party landowner). An approval for such a development would then assist the LPA in focussing retail development to this area of Lillyhall, and help to refuse applications that do not comply with this part of the Masterplan.

11.12. With regard to applications for hotels, this is somewhat more complex, as a result of the current levels of enquiries and extant permissions. Inevitably, an operator will develop the most beneficial to them at a particular time, so it is, to a certain extent, market driven. However, the LPA is under pressure from national guidance to take a sequential approach to site selection, and applications for hotel development, particularly those submitted prior to the Masterplan holding any weight, will need to be supported by a strong argument proving that Lillyhall is the most appropriate location for such development. This would include the regenerative impact of the hotel, underpinning the future development of Lillyhall.
11 Planning Fit

Medium term

11.13. The LPA is currently progressing its Local Development Framework (LDF) and Core Strategy as part of that process. It is important for NWDA to be fully engaged as a stakeholder in this process.

11.14. Changes to the regulations allow Core Strategies to identify strategic allocations. Discussions held at the Steering Group suggest that there is sufficient evidence to support such an allocation. Our recommendation would be for NWDA to make representations at the appropriate time, when they are consulted on the Core Strategy, with the view of having Lillyhall allocated in the Core Strategy, with an associated policy permitting a mix of employment-led development, including educational facilities, student accommodation and the Local Hub.

11.15. Taking this a step further, the Core Strategy policy could refer to applications being in accordance with an adopted Supplementary Planning Document (SPD) that would be prepared in parallel (or just behind) the Core Strategy. This SPD could also consider the detail and cost of likely Section 106 contributions expected from development proposals.

11.16. To develop an SPD, the Masterplan would have to be taken through a process of public consultation, with all comments submitted taken fully into consideration and responded to. This may involve making alterations to the Masterplan, which could then be ‘repackaged’ to form an SPD with associated explanatory text. The SPD may require additional staff resource but preparing it following the Core Strategy examination may assist in this.

11.17. Recent changes to the planning system (April 2009) ease requirements on the preparation of SPDs, including less stringent requirements for Sustainability Appraisal, and the withdrawal of the requirement for proposed SPDs to be covered in the Council’s Local Development Scheme. These changes will further facilitate this proposed approach.

Long term

11.18. The long term result would be the adoption of the Core Strategy including the strategic allocation, and possibly the subsequent adoption of an SPD, based on this Masterplan.

11.19. This would give the Masterplan (as amended) the weight within the planning application determination process of a material consideration, and as such, applications that comply with the policy / SPD could be supported by the LPA and NWDA (notwithstanding other considerations). Equally, applications that would jeopardise the long-term achievement of the Masterplan could be resisted on the strength of the policy / SPD.
12. Cost and Programme
Approach to costing

12.1. Following the issue of the Phase 1 Report, the emphasis from a cost management perspective has been to gather as much information as possible from the consultant group and 3rd parties, and to interpret that information in the form of a total infrastructure cost to enable NWDA to establish an allocation per acreage of land prior to bringing parcels of land forward for redevelopment or sale. Also identified are any “on-plot” site specific costs that might influence the residual land value.

12.2. Information has been obtained under the following headings:

• Infrastructure roads & highways (improvements and new);
• Public realm including parkland and bridge;
• Utilities upgrade and mains distribution around the site;
• Branding;
• Professional fees; and
• Risks.

12.3. The calculation of cost included within Appendix 8 has been apportioned into the four separate time phases as set out in the phasing section of this report. No inflationary uplift has been applied to future phases. Present day costs of 2Q09 have been used to prepare cost estimates.

12.4. A constant 8% for professional design and consultancy fees has been applied to the estimated value of the infrastructure capital construction works. This includes all engineering design, landscaping design, project management and cost management but excludes surveys, marketing and legal costs.

12.5. Costs associated with the various risks outlined within the risk register have not been calculated. The biggest risks are:

• Discovery of live services in the ground requiring rerouting;
• Removal of contaminants or ground obstructions (these cannot be fully determined without the aid of detailed ground investigation and even then, without a waste management strategy realistic cost assumptions cannot be made);
• Off-site Infrastructure highway works (the timing of the ongoing development work at Lillyhall and the influence of surrounding developments within the West Cumbria vicinity will influence the likelihood and extent of Highway’s Improvements. Experience states that something will need to be allocated against this cost heading. At time of writing the report this could range from £0 to £3m); and
• Environmental issues associated with the protection of endangered species (obstructions / considerations will influence the development sequence, and will need to be managed carefully according to seasonal influences).

12.6. The planned management of each of these risks in the future will minimise out turn cost.

Information received

12.7. Costs have been generated using information received from the following sources:

• Ecological observations from WYG;
• Infrastructure roads and roundabouts (new, widening, dual lane creation) from WYG;
• Infrastructure Utilities reinforcement and ring main distribution received from WYG;
• Public Realm allocation received from Taylor Young (TY);
• General Masterplan received from TY depicting plot sizes, use and density of development; and
• General Masterplan received from TY depicting phasing; and
• 3D images from which bridge and associated public realm works have been gauged.

12.8. Where drawing numbers and descriptions have been made available on formal information issues, these have been disclosed within the cost feasibility.

Guidance on content including Assumptions made

12.9. There is very little that has been left open to interpretation. All categories of cost that would normally be associated with a development of this nature have been represented in the feasibility costs. Clearly at the Masterplanning stage that we are at, the detail associated with the works is representative of the RIBA Design Stage B activities that have been undertaken. We have had to assume that normal ground conditions will prevail beneath the proposed highways and highway adaptations.

12.10. The cost feasibility is presented over several sheets in the order of:

• Master costs;
• Infrastructure cost breakdown;
• Detailed infrastructure calculations;
• Infrastructure phasing;
• Site considerations;
• Abnormal site conditions to consider for 5 proposed zones;
• Public realm breakdown; and
• TY schedule of areas.
12 Cost and Programme

12.11. All of the subsequent sheets feed into the master cost summary sheet in an ascendancy.

Interpretation of Phasing

12.12. The Phasing Plan (Figure 6.11) depicts a proposed four phased approach to the development of Lillyhall. Guidance has been received from WYG on the extent of utilities and highways additions over the four periods of implementation of “on-plot” development. Assumptions have been made as to the timing of certain Public Realm works and the delivery of bus stops and general signage. Ultimately, the development will be governed by the interest that is generated by external businesses to locate at Lillyhall and the selection and thus management of the availability of plots that ensues.

Programme

12.13. The programme extract and associated commentary provided on page 118 describes activities to be undertaken in the first 5 years of the Masterplan. The programme reflects the full Masterplan 20 year timescale illustrated in the Appendix 9.

Risks of various plots and the implications of cost

12.14. The major risks that exist within each plot are:
- The availability of infrastructure road-works and incoming utilities within the vicinity;
- Disruption associated with development on neighbouring plots;
- Geological and archaeological concerns raised within the desktop survey which can only truly be determined once a detailed ground investigation has been commissioned;
- Environmental concerns associated with potential delays occasioned by nesting birds and mating reptiles which carry programme delays;
- Off-site highways capacity problems which will inhibit the timing of developable plots; and
- Usual planning processes (e.g. applications that will be considered as departures – i.e. contrary to the currently adopted development plan – may take longer to determine and will be at risk of call-in).

Risks associated with the infrastructure and cost implications

12.15. The costs presented are the consultants’ best estimates based on all the information generated and made available through the Masterplanning commission. More thorough investigations (as recommended in this report) will give greater certainty (or otherwise) to the assumptions made and therefore to the associated costs.

12.16. The design of off-site infrastructure reinforcements is dependent on other activities within the region remaining equal. It is estimated by the consultant team that the cost of these works could be in the region of £3m, a cost that is not currently embodied within the total cost that has been estimated.

12.17. This £3m estimated cost should be considered as a risk item as precise costs are unknown, and considerable work would be required to formalise this amount, including detailed capacity analysis. The final figures for off-site infrastructure works would be for improvements to highways junctions / roundabouts etc remote to the site but within the West Cumbria area of Whitehaven and Workington which would be placed under significant traffic pressure at a particular time in the future as Lillyhall and indeed other sites are developed and populated. Improvements could include road widening, traffic lights, traffic calming etc.

12.18. Other risks could be:
- The timing of section 278 highways works relative to plot occupation;
- The topography of the land being such that new highways and highway adaptations involve significant civil engineering retaining structure or cut and fill exercises which have not been accounted for; and
- Existing services requiring diverting.
# Lillyhall Masterplan

## Five Year Implementation Programme [Q1: December 2009]

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CERESE Building Development
Road Improvements to A596 plus wider public transport improvements
Construction of Employment Facilities off A595
Construction of Employment Facilities Adjacent to Alcan Site
Construction of Greenways/Pathways/Cycleways
Managed Workspace
Construction of Office Accommodation North of Jubilee Road
Construction of Pedestrian/Cycle Bridge over A595
Site acquisition - BNFL building 16
Construction of Employment Facilities off Branthwaite Road
Landscape implementation to A595 north and Branthwaite Road
Construction of new Petrol Filling Station
New Car Dealership on A595
Water Main Upgrade
LILLYHALL MASTERPLA
Alternative site made available
CERESE open for Students
Construction work on site
Mitigation actions on site as a result of surveys
SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Road works / Roundabout to A596 / Hallwood Road Consultations / Road closure procedure
Site acquisition from Dobie's to connect Hallwood Road to A596
Existing Gates Tyres site vacant
Gates Tyres open in new premises
Facade upgrading works to existing Alcan buildings (41 & 42)
Wildlife and green uses area completed
Construction/Landscape work on site
Procurement of Landscape Contractors
Procurement of design and sign-off
Mitigation work on site as a result of surveys
Further site surveys as necessary
Demolition of buildings 45 - 47a
Land acquisition process/ Alcan market and sell to developers
New Employment Facilities opened
SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Procurement of Landscape Contractors
Site Sold to developer
OJEU Process for procurement of developer (if required)
Planning Application
Procurement of design
Site Sold to developer
OJEU Process for procurement of developer (if required)
Site Marketed to Developers
Greenways formally opened - PR event to reinforce branding
Construction work on site
Design and specification signed off
Design /Landscape team appointed
New office accommodation opens
Planning Application
SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Procurement of design
Site Sold to developer
OJEU Process for procurement of developer (if required)
Site Marketed to Developers
Procurement of contractor
Planning Application
Procurement of design
Site Sold to developer
OJEU Process for procurement of developer (if required)
Site Marketed to Developers
Construction on site
Procurement of contractor
Planning Application
Procurement of design
Site Sold to developer
Site Marketed to Developers
New office accommodation opened
Mitigation work on site as a result of surveys
Design procurement
SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Construction of Bridge on / off site
Procurement of design team
Funding approved
Application for funding
Demolition of existing BNFL building
Vacant possession of existing BNFL site
BNFL decant and begin to operate from new site
PR event to mark opening of the Hub
Hub & Office Accommodation opened
Construction work on site
Planning Application
SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Procurement of developer
Mitigation actions on site as a result of surveys
Planning Application
Design procurement and sign-off
SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Procurement of developer
Landscaping completed
Construction of paths / planting of trees & shrubs
Employment facilities opened
Procurement of Contractors
Planning Application
New office accommodation opened
Construction work on site
Design procurement and sign-off
SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Procurement of Contractors
Planning Application
Construction work on site
SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Hotel opened
Construction work on site
Mitigation actions on site as a result of surveys
Procurement of Contractors
Any further SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
Procurement of developer ( Sell to developer)
Planning Application
Design Procurement
Procurement of Developer
Place order
Pre-order lead in time
Place order
Planning application (sub-stations)
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**Notes:**
- **Procurement of Contractor:** Tenders issued.
- **Planning Application:** Application submitted.
- **Design Procurement:** Design selection.
- **Construction work on site:** Work begins.
- **Mitigation actions on site as a result of surveys:** Mitigation work.
- **Planning Application:** Application submitted.
- **Design procurement and sign-off:** Design sign-off.
- **Mitigation actions on site as a result of surveys:** Mitigation work.
- **Design procurement:** Design selection.
- **Construction on site:** Work begins.
- **Mitigation actions on site as a result of surveys:** Mitigation work.
- **Planning application (sub-stations):** Application submitted.
- **Design procurement:** Design selection.
- **Construction (including trenching):** Work begins.
- **Pre-order lead in time:** Pre-order placed.
- **Construction work on site:** Work begins.
- **Planning application:** Application submitted.
- **Design procurement and sign-off:** Design sign-off.
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## LILLYHALL MASTERPLAN

### FIVE YEAR IMPLEMENTATION PROGRAMME (V.1: December 2009)

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<td><strong>Construction of New Office Accommodation off A396 &amp; SUDS Area</strong></td>
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<td>OJEU Process for procurement of developer (if required)</td>
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<td><strong>Construction of Greenways/Pathways/Cycleways</strong></td>
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<td>Greenways formally opened - PR event to reinforce branding</td>
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<td>FIVE YEAR IMPLEMENTATION PROGRAMME</td>
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</table>

**Construction of Employment Facilities Adjacent to Alcan Site**
- Site Marked to Developers
- OJEU Process for procurement of developer (if required)
- Site Sold to developer
- Procurement of design
- SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
- Planning Application
- Procurement of contractor
- Construction work on site
- New Employment Facilities opened

**Construction of Employment Facilities off A595**
- Site Marked to Developers
- OJEU Process for procurement of developer (if required)
- Site Sold to developer
- Procurement of design
- SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
- Planning Application
- Procurement of contractor
- Construction work on site
- New Employment Facilities opened

**Construction of Employment Facilities off Branthwaite Road**
- Site Marked to Developers
- OJEU Process for procurement of developer (if required)
- Site Sold to developer
- Procurement of design
- SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
- Planning Application
- Procurement of contractor
- Construction work on site
- New Employment Facilities opened

**Construction ofnew Office Accommodation**
- Procurement of contractor
- Planning Application
- Design and specification signed off
- SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
- Construction work on site
- Planning Application
- Procurement of developer (if required)
- Site Sold to developer
- Managed Workspace opens

**Construction of new Petrol Filling Station**
- Site Marked to Developers
- OJEU Process for procurement of developer (if required)
- Site Sold to developer
- Procurement of design
- SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
- Planning Application
- Procurement of contractor
- Construction work on site
- New Employment Facilities opened

**Construction of New Office Accommodation off A596 & SUDS Area**
- Site Marked to Developers
- OJEU Process for procurement of developer (if required)
- Site Sold to developer
- Procurement of design
- SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
- Planning Application
- Procurement of contractor
- Construction work on site
- New Employment Facilities opened

**Construction of Bridge on / off site**
- Site Marked to Developers
- OJEU Process for procurement of developer (if required)
- Site Sold to developer
- Procurement of design
- SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
- Planning Application
- Procurement of contractor
- Construction work on site
- New Employment Facilities opened

**Construction of wildlife area on Alcan site**
- Land acquisition process/ Alcan vacate site and sell to developers
- Alcan vacate site
- SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out
- Demolition of buildings 45 - 45
- Further site surveys as necessary
- Mitigation work on site as a result of surveys
- Procurement of design and sign-off
- Planning Application
- Procurement of contractor
- Construction/Landscape work on site
- Wildlife and green uses area completed
- Façade upgrading works to existing Alcan buildings (41 & 42)
**CERESE Building Development**

**Construction of Employment Facilities off A595**

**Managed Workspace**

**Construction of Employment Facilities off Branthwaite Road**

**Construction of new Petrol Filling Station**

**Construction of new Car Dealerships**

**Sewer Upgrade**

**Electrical Services Upgrade**

**Gates Tyres decant to alternative site**

**Construction of Greenways/Pathways/Cycleways**

**FIVE YEAR IMPLEMENTATION PROGRAMME**

**Student Accommodation**

**Lillyhall North site Development/Construction of new hotel development**

**Sewer Upgrade**

**Mains Gas Upgrade**

**Gates Tyres decant to alternative site**

**LILLYHALL MASTERPLA**

**Alternative site agreed by negotiation**

**Construction work on site**

**CERESE Design development**

**Alternative site made available**

**CERESE open for Students**

**College/University appoints Design team for CERESE**

**Gates Tyres open in new premises**

**Road works / Roundabout to A596/Hallwood Roa**

**Bus shelter upgrade and associated service improvements**

**Consultations / Road closure procedure**

**Façade upgrading works to existing Alcan buildings (41 & 42)**

**Mitigation work on site as a result of surveys**

**Demolition of buildings 45 - 47a**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Procurement of contractor**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Site Marketed to Developers**

**Procurement of contractor**

**OJEU Process for procurement of developer (if required)**

**Greenways formally opened - PR event to reinforce branding**

**Construction work on site**

**Design /Landscape team appointed**

**Land Acquisition process**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Site Sold to developer**

**Procurement of contractor**

**Planning Application**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Site Sold to developer**

**New office accommodation opened**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Application for funding**

**BNFL decant and begin to operate from new site**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Employment Facilities opened**

**Mitigation actions on site as a result of surveys**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Landscaping completed**

**Procurement of Landscape Contractors**

**Procurement of Contractors**

**Planning Application**

**Procurement of design and sign-off**

**Design /Landscape work on site**

**Planning Application**

**Procurement of contractor**

**Construction work on site**

**Procurement of Contractors**

**Mitigation actions on site as a result of surveys**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Hotel opened**

**Procurement of developer (Sell to developer)**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Construction (including trenching)**

**Consultation with service provider**

**Design**

**Construction (including trenching)**

**Pre-order lead in time**

**Design**

**Construction / Landscape work on site**

**Planning Application**

**Procurement of design team**

**Application for funding**

**Vacant possession of existing BNFL site**

**Remediation / Construction works on new site carried out**

**Approved new site made available for BNFL**

**Construction work on site**

**Planning Application**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Employment Facilities opened**

**Construction work on site**

**Procurement of Contractors**

**Procurement of Contractors**

**Procurement of Contractors**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Car dealerships opened**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Hotel opened**

**SI, Infrastructure, Ecology (seasonal) & Archaeology surveys carried out**

**Construction (including trenching)**

**Place order**

**Design**

**Consultation with service provider**

**Place order**

**Consultation with service provider**

**Pre-order lead in time**

**Construction (including trenching)**

**Place order**

**Pre-order lead in time**

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<table>
<thead>
<tr>
<th>Project Name/Description</th>
<th>Proposed Landuse</th>
<th>Brief Project Background</th>
<th>Infrastructure Implications</th>
<th>Funding</th>
<th>Project Management</th>
<th>Order of Cost</th>
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<tbody>
<tr>
<td>CERESE Building Development</td>
<td>Further and Higher Education (Ph1)</td>
<td>The CERESE project forms part of an ongoing collaboration between Lakes College and the University of Cumbria. The proposed new space will act as a new high profile research establishment into the renewable energy agenda. The proposed uses link with the programme being driven forward by Energus.</td>
<td>Phase 1 Infrastructure works include: upgrade of existing roads, new road/roundabouts; water mains distribution; electrical, gas and drainage service enhancements plus associated buildings work; off-site highway work; and subsidisation of bus services.</td>
<td>Partnership</td>
<td>Energy campus</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Gates Tyres decant to alternative site</td>
<td>Retail (Sui Generis)</td>
<td>The development site identified for Phase 1. Lakes College Construction Centre requires acquisition of the Gates Tyres site. Relocation of the existing business will be required before on site work can commence.</td>
<td>The work attracts a total cost of £12,915,641, excluding the cost of road improvements to the A595 and landscape upgrades to AS55 (north) and Branthwaite Road. A detailed breakdown of all Phase 1 infrastructure costs is provided in the Appendix.</td>
<td>Private</td>
<td>Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>CERESE Phase 1 and 2 on site</td>
<td>Further and Higher Education (Ph1)</td>
<td>As above.</td>
<td>As above.</td>
<td>Partnership</td>
<td>Energy campus</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Road Improvements to A595 plus wider public transport improvements</td>
<td>Highway, public transport improvements and public realm enhancement with associated signage and branding upgrades.</td>
<td>Increased site capacity and additional highway movements associated with development of sites will require investment in public transport and highway improvement works to the A595.</td>
<td>Increased site capacity will require reinforcement of existing services in order to provide adequate levels of service.</td>
<td>Public</td>
<td>Cumbria County Council</td>
<td>£333,000</td>
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<tr>
<td>Electrical Services Upgrade</td>
<td>Infrastructure reinforcement including new primary sub-stations, sub-stations, trenching and associated cable network.</td>
<td>Increased site capacity will require reinforcement of existing services in order to provide adequate levels of service.</td>
<td>Increased site capacity will require reinforcement of existing services in order to provide adequate levels of service.</td>
<td>Public</td>
<td>British Energy Coast West Cumbria</td>
<td>£2,551,029</td>
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<tr>
<td>Water Main Upgrade</td>
<td>Infrastructure upgrade including new distribution and trunk mains (including trenching).</td>
<td>Increased site capacity will require reinforcement of existing services in order to provide adequate levels of service.</td>
<td>Increased site capacity will require reinforcement of existing services in order to provide adequate levels of service.</td>
<td>Public</td>
<td>British Energy Coast West Cumbria</td>
<td>£350,095</td>
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<tr>
<td>New Car Dealership on A595</td>
<td>Retail (Sui Generis)</td>
<td>Development of this site recognises an existing commitment.</td>
<td>Development of this site recognises an existing commitment.</td>
<td>Private</td>
<td>Developer</td>
<td>Subject to further detailed brief and development studies.</td>
</tr>
<tr>
<td>New Office Accommodation next to Stagecoach Bus depot</td>
<td>Employment (162)</td>
<td>Development of this site recognises an existing commitment.</td>
<td>Development of this site recognises an existing commitment.</td>
<td>Private</td>
<td>Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Lillyhall North site Development / Construction of new hotel development</td>
<td>Hotel (L1)</td>
<td>A local developer is keen to progress the development of this site and has undertaken a series of feasibility studies. Development of this site recognises the existing commitment.</td>
<td>Development of this site recognises the existing commitment.</td>
<td>Private</td>
<td>Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Project Name/Description</td>
<td>Proposed Landscape</td>
<td>Brief Project Background</td>
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<tr>
<td>Construction of new car dealerships</td>
<td>Hental (Suir Cameron)</td>
<td>Car dealerships have been located on the main approach for maximum profile.</td>
<td>Private Developer</td>
<td>Private Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Construction of new filling station</td>
<td>Hental (Suir Cameron)</td>
<td>Positioned off the A596 gateway route.</td>
<td>Private Developer</td>
<td>Private Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Construction of new Office Accommodation</td>
<td>Employment (B1)</td>
<td>Phase two proposal involving development of a range of products.</td>
<td>Private Developer</td>
<td>Private Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Construction new employment facilities</td>
<td>Employment (B1/B2)</td>
<td>A variety of terraced and semi-detached units focusing on the Nuclear Supply Chain industry.</td>
<td>Private Developer</td>
<td>Private Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Landscape implementation to A595 north and Branthwaite Road</td>
<td>Public realm with associated signage and branding upgrades.</td>
<td>Landscape upgrades, green loop and signage upgrades that will achieve improvements to the appearance of Lillyhall on the main A595 corridor and facilitate greater interaction between different areas.</td>
<td>Public Developer</td>
<td>Public Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Construction of Employment Facilities off Branthwaite Road</td>
<td>Employment (B1/B2)</td>
<td>Development of this site recognises an existing commitment by Friends Sites Limited.</td>
<td>Partnership Developer</td>
<td>Partnership Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Construction of Hub &amp; Office Accommodation on BNFL site</td>
<td>Hental (AYA/A5) and employment (B1)</td>
<td>The Local Hub and associated landscape space will be driven by market demand. Proposals indicated in the masterplan respond to the overall vision that sees a new creation of a recognisable focal point for Lillyhall as a positive future aspiration but will nevertheless be influenced by further more detailed studies.</td>
<td>Private Developer</td>
<td>Private Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Site acquisition - BNFL building 16</td>
<td>Hental (AYA/A5) and employment (B1)</td>
<td>The development site identified for the Local Hub requires acquisition of the BNFL building 16 site. Demolition and remediation will be required before on site work can commence.</td>
<td>Private Developer</td>
<td>Private Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Construction of Pedestrian/cycle bridge over A595</td>
<td>Veg-Inge structure and associated public realm, signage and branding.</td>
<td>This scheme provides an important physical component of the proposed cycle and footpath green network. It also represents a real opportunity to put Lillyhall on the map through development of iconic design that should be promoted through this process.</td>
<td>Public Developer</td>
<td>Public Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Construction of Office Accommodation North of Jubilee Road</td>
<td>Employment (B1)</td>
<td>Proposals for this site extend the positive development of the adjacent West Cumberland House, with further visual relationships to the wider context.</td>
<td>Public Developer</td>
<td>Public Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Managed Workspace</td>
<td>Employment (B1)</td>
<td>The provision of the managed workspace is seen as a progression from activities taking place in the education institutions and reflects a number of existing on site objectives.</td>
<td>Public Developer</td>
<td>Public Developer</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Project Name/Description</td>
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<tr>
<td>Construction of New Office Accommodation off A595 &amp; SUDS Area</td>
<td>Employment (81)</td>
<td>The proposed office accommodation in this location is part of the phased progression of development in Lillyhall West. The new development will also provide definition and presence on the A596 as a key corridor into Lillyhall. Neighbouring SUDS and wildlife areas will contribute to the overall masterplan aspirations of creation of place and specific issues emerging from ecology studies and the need to provide habitat retention.</td>
<td>Public</td>
<td>Britain's Energy Coast Cumbria</td>
<td>Subject to further detailed brief and development studies.</td>
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<tr>
<td>Construction of Greenways/Pathways/Cycleways</td>
<td>Public realm with associated signage and branding upgrades.</td>
<td>The creation of attractive green routes across Lillyhall that will actively encourage walking/cycling and interaction by businesses and other users is one of the key messages emerging from the masterplan. The greenways also connect to the wider environment and provide further areas of habitat intervention.</td>
<td>Public</td>
<td>Britain's Energy Coast Cumbria</td>
<td>£43,750</td>
<td></td>
</tr>
<tr>
<td>Construction of Employment Facilities Adjacent to Alcan site</td>
<td>Employment (81a)</td>
<td>New employment facilities in these locations are seen as complimentary to existing businesses providing grow-on space and accommodation for incoming businesses.</td>
<td>Private</td>
<td>Developer</td>
<td>Subject to further detailed brief and development studies.</td>
<td></td>
</tr>
<tr>
<td>Construction of Employment Facilities off A595</td>
<td>Employment (81a)</td>
<td>Improvements to the quality of frontage provided on the A595 will be achieved through selective infill and refurbishment of existing building stock in order to maintain and enhance this part of Lillyhall.</td>
<td>Private</td>
<td>Developer</td>
<td>Subject to further detailed brief and development studies.</td>
<td></td>
</tr>
<tr>
<td>Construction of wildlife area on Alcan site</td>
<td>Employment (81a)</td>
<td>The wildlife area neighbouring Alcan Lillyhall provides a direct green connection to the wider context, reinforcing a number of the fundamental objectives defined within the masterplan.</td>
<td>Public</td>
<td>Britain's Energy Coast Cumbria</td>
<td>£1,250,000</td>
<td></td>
</tr>
</tbody>
</table>
Exclusions

12.19 The following exclusions apply to the costs that have been presented:

- VAT;
- Land Acquisition and disposal costs (other than explicitly identified);
- Developer costs and profit;
- Finance;
- Costs associated with “on plot” building development;
- Adjustment to costs to account for tender prices beyond 2Q09;
- Legal fees, including works associated with easements, covenants and land title;
- Marketing;
- Detailed surveys including Traffic, Noise, Ecological, Topographical, Ground Investigation etc. It is anticipated that these would be covered with the submission of individual planning applications. Associated costs – for example ground remediation will depend on the outcome of the detailed ground investigation survey;
- Relocation costs associated with existing businesses and new including grants and incentives;
- Green Travel Planning costs (bus pump priming is however included – further information is outlined in the Transport and Movement Section);
- Sustainable and Renewable Energy Improvements;
- Off-Site highway works improvements. There has been a suggestion from WYG that this might be as much as £3m (included) but is unproven until the completion of further surveys and discussions. A contingency allowance should be made to accommodate this potential cost;
- Traffic lighting and calming measures within Lillyhall;
- Relocation of existing services of gas, water, electricity (HV or LV), telecommunications, drainage etc;
- Contamination removal associated with new highways and utilities infrastructure;
- Abnormal ground conditions, including dealing with shallow mine workings and geological issues beneath roads, beneath bridge foundations and within trenches;
- Ecological issues relating to relocation of protected species and creation of new habitats except where indicated;
- Works to existing buildings in improving the façade treatment and therefore general appearance; and
- Section 106 or 278 costs.

Headline figures

12.20 Extracting key information from the detailed cost breakdown identifies the following “headline” figures (rounded), shown by phase in accordance with figure 6.11.
12.21. These headlines breakdown into phasing and individual elements as set out in the table below:

| Land acquisition |

12.22. The land acquisition costs to purchase necessary third party land to deliver the whole Masterplan have been estimated as set out below. This includes stamp duty, agents and legal fees on a phase by phase basis. Excluded are the Alcan site and the existing petrol filling station. The Alcan site is currently under offer and in legals to be acquired by a local investor, and the PFS acquisition cost would be based on the throughput of fuel sold from the site and not just bricks and mortar, and so is not possible to estimate in this exercise.

<table>
<thead>
<tr>
<th>Item</th>
<th>Phase 1</th>
<th>Phase 2</th>
<th>Phase 3</th>
<th>Phase 4</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land Acquisition Budget</td>
<td>£3,890,000</td>
<td>£350,000</td>
<td>£4,000,000</td>
<td>£2,800,000</td>
<td>£11,040,000</td>
</tr>
<tr>
<td>Stamp Duty</td>
<td>£197,550</td>
<td>£5,250</td>
<td>£177,000</td>
<td>£154,000</td>
<td>£533,800</td>
</tr>
<tr>
<td>Agents &amp; Legal acquisition fees</td>
<td>£757,660</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>£4,087,550</td>
<td>£355,250</td>
<td>£4,177,000</td>
<td>£2,954,000</td>
<td>£11,573,800</td>
</tr>
</tbody>
</table>

Land acquisition costs, based on plots shown at Appendix 7
1. Excludes Alcan Site & Buildings - Plots 62, 63, 65, 66, 67 & 69
2. Excludes Alcan Site & Buildings – Plot 64
3. Excludes existing PFS - and Alcan site – Plot 68

12.23. The assessment is based upon very basic information taken from OS (Promap). Building areas have been assessed from OS (assumed mainly single storey) where these exist on sites to be redeveloped. Individual properties have not been reviewed in detail. It is an estimate of potential acquisition costs assuming vacant possession values, and assumes a willing vendor. It does not include any costs associated with compulsory acquisition, business relocation or business extinguishment.

12.24. Whilst this is based on a building-by-building exercise, more detailed formal valuations would be necessary to certify these estimates.
12 Cost and Programme

Phasing

12.25 The phasing of the delivery of the infrastructure and public realm elements of the Masterplan will determine the amount of funding required. The full phasing plan is shown at figure 6.11 and supplemented at Appendix 9 which sets out a more detailed indicative programme. The Masterplan contains higher value elements (retail at the Local Hub, hotel, student accommodation, car showrooms) and elements that currently, due to property market and economic conditions, will require public sector financial support (B1, B2, and B8 uses). It is impossible to comment at this time upon the levels of potential financial support that will be required for individual development proposals. However, Appendix 2 does comment upon the viability of the current proposals.

12.26 Estimated serviced land values per hectare are shown in the following table:

<table>
<thead>
<tr>
<th>Use</th>
<th>Estimated Serviced Land Value per hectare (acre)</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>B1 – Office / Light Industrial</td>
<td>£148,258 - £160,612 (£60,000 - £65,000)</td>
<td>Higher value would apply to office use.</td>
</tr>
<tr>
<td>B2 - Industrial</td>
<td>£123,548 (£50,000)</td>
<td></td>
</tr>
<tr>
<td>B8 - Distribution</td>
<td>£123,548 (£50,000)</td>
<td></td>
</tr>
<tr>
<td>Car Showroom</td>
<td>£617,742 (£250,000)</td>
<td></td>
</tr>
<tr>
<td>PFS / Drive Through Restaurant</td>
<td>£494,193 (£200,000)</td>
<td></td>
</tr>
<tr>
<td>Hotel/Pub</td>
<td>£494,193 (£200,000)</td>
<td></td>
</tr>
<tr>
<td>Student Accommodation</td>
<td>£370,645 (£150,000)</td>
<td></td>
</tr>
<tr>
<td>Local Hub - Retail</td>
<td>£741,290 (£300,000)</td>
<td></td>
</tr>
<tr>
<td>Local Hub - Community</td>
<td>£247,100 (£100,000)</td>
<td>Crèche/Gym/Exhibition</td>
</tr>
</tbody>
</table>

Infrastructure cost delivery

12.27 Estimates of the cost of providing the infrastructure, services and public realm improvements required to deliver the Masterplan on a phase by phase basis are shown in detail in the tables provided earlier.

12.28 The enabling infrastructure cost is likely to be funded through public sector subsidy, although the opportunity to secure certain payments through Section 106 Agreements to fund infrastructure and other community related provision should be fully considered by the stakeholders.

12.29 A tariff approach is a structured way of securing fixed financial contributions to fund infrastructure. It will be necessary to quantify the level of contribution upfront so it is transparent, and interested developers can factor this into their valuation of the land as it is drawn down for development. Given the relatively low level of current rents and values applicable in West Cumbria, it is likely that commercial employment development (B1, B2 & B8 Uses) will require public subsidy in any event (disregarding any fixed contributions towards infrastructure) and as such, the public sector would indirectly end up paying the infrastructure costs in any event.

12.30 The cost of providing infrastructure, services and public realm improvements required to deliver the Masterplan will exceed the capital receipts (based upon current estimate of total realisable value) that could be made available from the sale of development land. As such public funding would be required to facilitate this investment.

12.31 In circumstances where a Section 106 agreement would be considered appropriate, for example in a healthier market or in higher value areas of Lillyhall, perhaps the most typical S106 contribution will be towards highways works. The table on page 135 sets out how calculations can be made across the site on a floorspace and area basis to ensure fairness for developers.

12.32 The total development in the Masterplan is predicted to generate around 4,000 two-way trips in the morning peak and 3,000 two-way trips in the PM peak. Operational Assessment work has shown that this level of development cannot be accommodated on the existing local highway network and therefore a series of highway improvements are required. The cost associated with these improvements has been estimated.
by MACE at £1.85m which is a works cost and does not account for statutory utilities diversions, design fees etc.

12.33. In cases where a S106 in appropriate, a funding mechanism is required to establish how much money each plot contributes to a pot of S106 funding needed to finance highway improvement works. The amount of funding that each development plot contributes to the pot is broadly derived from the land use class and gross floor area (gfa) of each plot. The table opposite illustrates how this mechanism works and shows highway costs apportioned in two-way AM trip generation (trips in both direction) by land-use. The table shows the development site broadly divided into 5 areas as used in the transport and movement Section (see figure 8.1) and has been created to demonstrate the principles for calculating developer contributions. For future cost purposes the breakdown of the development site can correspond to phasing.

12.34. The table opposite shows the total gfa for each land-use and the total number of two-way AM trips generated by each land use. A cost for each land-use has then been derived by applying the percentage of total two-way trips for each land-use category by the total cost (£1.85m). A cost has also been calculated for each land-use category within each of the five areas. The total cost has been divided by the total number of two-way AM trips providing a figure of £594.66 which will provide the basis for the rate of charge for each business.

12.35. Reference should be made to figure 8.1 for the areas as referred to in this table.

12.36. Other areas of S106 agreement could include financial contributions towards public realm works (both capital and revenue works), public art (although this may be better achieved as part of development proposals and approved by the LPA and the NWDA) and public transport improvements (facilities and services).

12.37. These would be established in accordance with the LPA’s adopted standards or otherwise to be agreed on a case by case basis, and would depend on a wide range of variables including floor space created, and importantly, the quality of the proposed development and whether S106 monies are needed as part of the scheme. For example, whilst most schemes should be required to contribute towards highways works as set out, if the scheme included high quality public art and landscaping it may not be necessary to seek S106 contributions in these areas.

12.38. In order to deliver the infrastructure improvements required to deliver the Masterplan it will be necessary to establish where funding will come from and how existing and future landowners / developers will contribute towards this provision.

12.39. One way of securing contributions towards infrastructure provision will be through landowner agreements whereby joint landowners will fund the infrastructure required to service their respective land holdings. The key issue to address is the ability for landowners to reach agreement between themselves upon the level of contributions to be made towards the infrastructure provision.

12.40. The ability to fund the cost of infrastructure provision at Lillyhall is likely to fall primarily upon the public sector purse, however planning legislation does allow for certain payments to be made to fund infrastructure and other community-related provision which is impacted upon as a result of the proposed development or where the proposed development will benefit from the infrastructure provision. The primary means of securing these contributions will traditionally be through Section 106 Planning Agreements.

12.41. There is a risk that if joint landowners can not reach agreement between themselves upon the level of contribution each makes towards infrastructure provision, then once the Masterplan is adopted only requirements enshrined in planning policy (secured through Section 106 Agreements) or works required to service the land can be relied upon as being secured.

12.42. If relying upon Section 106 contributions to fund the necessary infrastructure provision it will be necessary to ensure that the levels of contributions required are transparent and known upfront, so that developers can take them into account in any viability studies undertaken. This can be achieved through the adoption of an SPD a set out in the Planning Fit section of this report.

12.43. Given the relative low levels of rents and capital values currently achievable at Lillyhall it is unlikely that developers will be able to afford substantial Section 106 contributions, especially in the current market, perhaps with one or two exceptions where higher value uses are proposed and which could generate a significant uplift in land value which could carry an appropriate infrastructure cost.

12.44. It is recommended that legal advice is obtained with regard to the use of Section 106 contributions to secure infrastructure contributions.
### Lillyhall Masterplan | Phase 2 Report

<table>
<thead>
<tr>
<th>Area 1</th>
<th>Area 2</th>
<th>Area 3</th>
<th>Area 4</th>
<th>Area 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>B1 Business Park</td>
<td>96,112</td>
<td>2443</td>
<td>78.5%</td>
<td>£1,452,764</td>
</tr>
<tr>
<td>B2 /B8 General Industrial</td>
<td>69,619</td>
<td>305</td>
<td>9.8%</td>
<td>£181,373</td>
</tr>
<tr>
<td>Hotel</td>
<td>3,395</td>
<td>42</td>
<td>1.4%</td>
<td>£24,976</td>
</tr>
<tr>
<td>Car Showroom</td>
<td>4,175</td>
<td>131</td>
<td>4.2%</td>
<td>£77,901</td>
</tr>
<tr>
<td>Student Accommodation</td>
<td>3,800</td>
<td>10</td>
<td>0.3%</td>
<td>£5,947</td>
</tr>
<tr>
<td>PFS</td>
<td>1,045</td>
<td>0</td>
<td>0.0%</td>
<td>£0</td>
</tr>
<tr>
<td>Gym</td>
<td>1,350</td>
<td>60</td>
<td>1.9%</td>
<td>£35,680</td>
</tr>
<tr>
<td>Creche</td>
<td>750</td>
<td>60</td>
<td>1.9%</td>
<td>£35,680</td>
</tr>
<tr>
<td>Retail</td>
<td>1,750</td>
<td>60</td>
<td>1.9%</td>
<td>£35,680</td>
</tr>
<tr>
<td>TOTAL</td>
<td>181,996</td>
<td>3111</td>
<td>100.0%</td>
<td>£1,850,000</td>
</tr>
</tbody>
</table>

Section 106 contribution table (NB – only land uses within each of the 5 areas have been included)
13. Risk Management Process
13.1. The Lillyhall Masterplan Risk Register has developed throughout the commission, including analysis against early Phase 1 Report findings and Steering Group discussions, through the options analysis and the emerging draft and final Masterplan.

13.2. In particular, the Steering Group contributed to a Risk Workshop, structured by providing suggested risk categories, including: Planning, Economic, Property, Reputational, Ecological, Programme, Infrastructure, Financial / Commercial, Health and Safety, Communication and Technical. A scoring criterion was provided for estimating the likelihood and impact of each identified risk, the results of which have been incorporated into the risk register.

13.3. The final risk register is shown in Appendix 6 and the key issues are summarised below:

- The high risks identified are the planning departments of Allerdale (and Copeland and Cumbria) agreeing the status and direction of the Masterplan proposals;
- WYG have not been able to carry out site investigation work other than a desktop exercise. Intrusive ground investigations, as well as thorough ecological surveys in respect of protected species, need to be carried out to provide detailed information on the extent of any risks to infrastructure and viability of individual plots. In discussions at Steering Group meetings it has been agreed that developers will take on the cost of these surveys as part of their proposals.

Future uses of the risk register

13.4. As the Steering Group take the project into the implementation phase, the risk register will serve as a useful ‘live’ document that can have a presence at future Steering Group meetings.

13.5. It is effectively a database or action checklist for each risk ‘owner’. Progress against each owner’s mitigation actions can be updated and reported on at each meeting (probably just concentrating on the highest risks).

13.6. During each ‘Risk update’ section of the Steering Group agenda, any newly identified risks should be added to the register. Those risks that have been successfully mitigated by their owners should also be closed.
14. Delivery & Funding
14.1. This section of the report provides a range of generic and specific delivery structures that could be applicable to delivering the Lillyhall Masterplan. It examines the key issues of each, considers the appropriateness of each in the context of Lillyhall and provides a recommendation upon a way forward.

14.2. This section also gives consideration to which organisation could be responsible for promoting the Masterplan given that there are a number of established organisations that could take on this responsibility. These include:

- Lillyhall Partnership;
- NWDA;
- Britain’s Energy Coast West Cumbria;
- Allerdale Borough Council (ABC).

14.3. Whilst NWDA is the principal landowner, delivery of the entire Masterplan will include land currently within third party ownerships.

14.4. Delivery of the Masterplan will require the support of all stakeholders and, where possible, the support of other third party landowners within Lillyhall. The scale of Lillyhall, the nature of the Masterplan proposals, the timeframe (20-year period) and land ownership issues, will all influence delivery.

### Delivery of the Masterplan Vision

14.5. There are a number of alternative approaches that require consideration when examining delivery of the Masterplan. Which approach to adopt will very much depend upon the level of support from stakeholders and landowners, property market conditions, and the need for “enabling” expenditure to deliver the early phases of development.

14.6. The options, which are quite disparate, will range from a planning-led option to a more interventionist approach.

#### Planning-Led Approach

14.7. This route will rely upon planning policy to direct market activity. It is clear from discussions with planning representatives within ABC that the Masterplan as it currently stands is not going to have any formal planning status within the LDF. However, it could be adopted as a Supplementary Planning Document (SPD) in due course (subject to agreement upon structure) once the LDF is in place, with appropriate recognition of Lillyhall (as set out in Section 11 of this report). The site is already allocated within the current local development plan for employment uses, and some areas would therefore be capable of being developed in an ad-hoc manner without the focus of the Masterplan and without compromising its vision. A planning-led approach would not provide for delivery of infrastructure or public realm improvements; although developer contributions could be secured through S106 agreements (see Section 12 for further details). This route does not promote joint working between landowners. The advantages and disadvantages of this approach are illustrated in the table below.

<table>
<thead>
<tr>
<th>Advantage</th>
<th>Disadvantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple approach</td>
<td>Lack of control over delivery of phasing of scheme</td>
</tr>
<tr>
<td>Limited public sector financial exposure</td>
<td>No control over branding or marketing</td>
</tr>
<tr>
<td>Developers left to their own devices</td>
<td>Risk that overall vision will never be achieved</td>
</tr>
</tbody>
</table>

**Planning-Led Approach: Delivery Assessment**
14 Delivery & Funding

Strategic Development Partnership (SDP)

14.8. The creation of a Strategic Development Partnership (SDP) between the various landowners and other stakeholders to drive delivery of the Masterplan vision is an option that should be considered where the aspirations of the parties are aligned. Development activity can therefore be undertaken in a co-ordinated manner and in accordance with the Masterplan.

14.9. The SDP can take the form of a broad Memorandum of Understanding at its most simplistic level (and most appropriate for the alignment of public sector stakeholders) to a detailed legally enforceable collaboration agreement (more appropriate where public and private partnership is to be formed). The level at which the SDP is structured is very much down to the level of alignment of the landowners and stakeholders to achieve delivery of the Masterplan.

14.10. In relation to Lillyhall, possible partners could be the major landholders such as NWDA, NDA, the Alcan Site purchaser, Stobbarts and Energy Coast® Campus together with major stakeholders such as BECWC, WCDF, CCC and ABC. The Britain’s Energy Coast West Cumbria is leading on delivery of the Energy Coast® Masterplan within which Lillyhall is one of only two Strategic Employment Sites. If the SDP is the delivery approach adopted, BECWC could co-ordinate the “buy-in” of all key stakeholders and landowners to ensure that future improvements and development on site are programmed in a co-ordinated way, in line with the recommendations of the Masterplan. They will clearly need to work closely with all partners/stakeholders in particular NWDA.

14.11. If this is the chosen delivery route the Lillyhall Partnership and its assets could be amalgamated into the SDP or the Lillyhall Partnership could be expanded to create the SDP.

14.12. The advantages and disadvantages of this approach are outlined in the table below.

<table>
<thead>
<tr>
<th>Advantage</th>
<th>Disadvantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part of the Masterplan output will be an ability to generate a shared vision, thereby allowing delivery to be secured by the private sector where there is no direct public sector involvement.</td>
<td>Agreement to work together may be diluted if secured only by a Memorandum of Understanding.</td>
</tr>
<tr>
<td>Limited risk of the project failing if vision is based upon commercial reality</td>
<td>Inability to secure high level of increased land value that can assist in infrastructure provision – co-ordination of infrastructure provision could, however, secure contribution towards costs.</td>
</tr>
<tr>
<td>Comprehensive high-level branding and marketing of Lillyhall Estate can be achieved.</td>
<td>Managing the SDP and the various roles within it will be a major challenge given the complexity of ownership across Lillyhall.</td>
</tr>
<tr>
<td>Relatively simple, depending upon level of commitment required or necessary – depends upon relationship with other land owners</td>
<td></td>
</tr>
</tbody>
</table>

Strategic Development: Delivery Assessment
14.13. This would involve the creation of a Special Purpose Vehicle (SPV) Company (limited by guarantee), into which the land and property owners would contribute their assets. The level of representation on the Company Board would be directly related to the value of the land inputted into the Company, as would the share of any uplift in value secured through the agreed life of the project.

14.14. The advantages and disadvantages of this approach are set out in the table below but given the large number of individual land holdings at Lillyhall it would be extremely difficult to get a significant number of the land and property owners to agree to this method.

<table>
<thead>
<tr>
<th>Advantage</th>
<th>Disadvantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public sector would have a substantial stake owing to existing land holdings</td>
<td>Compliance and State Aid Issues**</td>
</tr>
<tr>
<td>If the SPV controls the whole Masterplan area Economies of scale can be achieved</td>
<td>Cost of set up of SPV Land value may not be reinvested</td>
</tr>
<tr>
<td>Opportunity to lever in private sector funding</td>
<td>Relies on a large number of existing landowners buying into the vision</td>
</tr>
<tr>
<td>Tax efficiency *</td>
<td></td>
</tr>
</tbody>
</table>

Planning-Led Approach: Delivery Assessment

*Creation of an SPV would create a corporate entity that would utilise tax efficient structures to ensure mitigation of taxation to maximise returns to the stakeholder.

** In order to comply with State Aid requirements, for example Market Equivalent Investor Principle, it may be that an inappropriate coupon (interest) rate is applied to assets where a deferred consideration is anticipated and this may create both commercial and process consent issues.

Public Sector Land Assembly

14.15. A further option to consider would be the assembly by the public sector of all the land necessary to deliver the Masterplan. Assembly of land could be by negotiation or through the use of compulsory purchase powers. The use of this option would be applicable where there are a number of third party interests required necessary to secure delivery of the Masterplan.

14.16. Given that the public sector already controls substantial land interests at Lillyhall, which remain undeveloped, the assembly of further land interests may prove difficult to justify, considering the current rates of demand, state of the economy and property market.

<table>
<thead>
<tr>
<th>Advantage</th>
<th>Disadvantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public sector control</td>
<td>Expensive in assembling sites necessary to deliver the vision.</td>
</tr>
<tr>
<td>Time consuming – CPO acquisition will prolong time taken to deliver the vision.</td>
<td></td>
</tr>
<tr>
<td>All risk taken by the public sector</td>
<td></td>
</tr>
</tbody>
</table>

Public Sector Land Assembly: Delivery Assessment
14 Delivery & Funding

Promoting the Masterplan and its benefits

14.19. As stated in paragraph 14.2 there are a number of locally based organisations that could potentially take on responsibility for promotion of the Masterplan.

Lillyhall Partnership

14.20. The Lillyhall Partnership, whose members are CCC, NWDA, WCDF and WDCA, have over recent years undertaken site servicing and direct development in addition to significant landscape and infrastructure improvements, establishment of security patrols and CCTV, enablement of broadband connectivity and improved signage. It also historically set up a web site to promote Lillyhall to new businesses seeking sites and premises in West Cumbria.

NWDA

14.22. NWDA is the principal development landowner at Lillyhall. Its remit is to support business and to promote and attract investment and jobs across the whole of the North West region with the aim of driving up GVA (Gross Value Added).

14.23. NWDA has limited personnel resources in West Cumbria, and they cover a wide physical area handling various direct and indirect projects.

14.24. Whilst NWDA have the ability to provide funding support, and could invest their development land to achieve the objectives of the Masterplan; given their limited local resources, it is not considered that they would be best placed to manage the promotion of the Masterplan.

Energy Coast™ Campus

14.25. Energy Coast™ Campus Project - this body was established in 2008 with a mission to integrate further and higher education in West Cumbria. It incorporates the key educational institutions (Energus, Lakes College West Cumbria, University of Cumbria) and has an investment fund of £10m. In this position it is ideally placed to coordinate and deliver the education and training developments identified in the Masterplan.

Recommendation

14.18. Taking into account the above, it is likely that a combination of the following options would provide the most flexible way of securing the benefits of the Masterplan vision:

• Strategic Development Partnership between key landowners and stakeholders that could in conjunction with or amalgamation with the Lillyhall Partnership assist delivery of the masterplan.

• Planning Led Approach - will rely upon subsequent adoption of the masterplan proposals as planning policy through the LDF process and the buy-in and co-operation of the key landowner’s to the Masterplan vision.

14.26. West Lakes Renaissance URC (now a shell URC) has had its role subsumed into two private sector led delivery boards – Britain’s Energy Coast West Cumbria and Barrow Vision formed in April 2009.

Britain’s Energy Coast West Cumbria (BECWC)

14.27. BECWC is leading upon the delivery of the Energy Coast™ Masterplan. It is the body responsible for delivering regeneration in West Cumbria and board representatives include NWDA, Homes and Communities Agency (HCA), CCC as well as the two local authorities Allerdale and Copeland Borough Councils and several private sector representatives. The organisation is currently supported by a team of staff drawn from existing resources within West Lakes Renaissance, CCC, and local Borough Council’s and is led by a Programme Director.

14.28. Whilst this organisation has only just come into being, its specific focus upon delivery of the Energy Coast™ Masterplan and regeneration projects within West Cumbria, using NWDA and other sources of funding, make it ideally suited to taking on the responsibility for promoting...
Delivery & Funding

Recommendation

Lillyhall Project Manager

14.29. It will be necessary to employ suitable resources to ensure delivery of the masterplan vision. We believe that this should be led by a Project Manager who would be in the employment of BECWC and whose role and responsibilities would include:

• Overall leadership and preparation of a business plan for implementation and delivery of Lillyhall Masterplan;
• Reporting to and implementing the Strategic Development Partnership Board outlined previously;
• Programme Management, Planning and Project Delivery;
• Corporate Governance;
• Co-ordination and management of public sector inputs and private sector inputs required to deliver masterplan improvements;
• Lead discussions and establish relationships with private sector developers, existing businesses and inward investors;
• Promoting the Lillyhall vision through PR, marketing and branding initiatives to existing businesses and inward investors;
• Supporting and contributing towards delivery of the Energy Coast™ Masterplan;
• Adapting appropriate structures/procedures to ensure that NWDA land assets can be made available for new development i.e. marketing, option agreements, development agreement;
• Securing funding approvals and controlling budgets from public sector partners to deliver proposed improvements; and
• Leading procurement including appointment of consultants and contractors adhering to OJEU procurement and adopted corporate governance procedures and requirements.

14.30. It is imperative that all of the key landowners and stakeholders collaborate to promote the benefits of delivering the masterplan vision to the other land and property owners. A unified approach by the major landowning parties supported by Britain’s Energy Coast West Cumbria, and other key public sector stakeholders would demonstrate substantial commitment to the delivery of improvements at Lillyhall which could be used to influence and persuade other land owners and business occupiers of the wider benefits of delivering the masterplan.

Options for NWDA owned land disposal

14.31. There are a number of further options to consider when looking at the delivery of the component parts of the Masterplan, especially land that is presently within NWDA ownership. The preferred delivery route will very much depend upon the type, complexity and scale of development in question. The various options are set out below:

Option 1 - Single Land Sale of all Public Sector Land

14.32. The option of outright sale of the land currently owned by the public sector to the private sector has been discounted for the following reasons:

• It does not give the opportunity to fulfil the regeneration and sustainability aims of the stakeholders;
• Only one capital receipt is received unless overage provisions are contained within the sale contract;
• Loss of control over key development sites and delivery of the Masterplan vision;
• Owing to quantum of land involved, any purchaser is likely to seek a discount;
• Latent value of sites may not be realised, as the site is sold before any development is undertaken; and
• The purchaser may land bank rather than undertake development.

Option 2 – Plot-specific individual development agreements on a phase-by-phase basis with multiple development partners

14.33. The development land is widely promoted by the stakeholders to attract developer/investor or end user interest. Stakeholders would include NWDA and other partners, depending upon which delivery structure is adopted. If the planning led approach is adopted then it is likely that this will principally be NWDA – this option is a traditional contractual route utilised to secure development. If a Strategic Development Partnership route is adopted all stakeholders within that partnership would promote the development land.
14 Delivery & Funding

14.34. Under either structure individual development agreements are entered into between the landowners and the developer/end user on a plot-by-plot basis. The developer/end user finances the development from their own resources or using debt finance.

14.35. The developer/end user will pursue this option, provided it can realise a profit through one or more of the following:

- Capital receipt realised from a disposal of a building;
- Rental income from an end user;
- Project management fee for managing the development; and
- A return on development costs.

14.36. At the current time it is unlikely that a commercial return could be obtained without intervention from public sector in the form of gap funding due to low rental and capital values. However, assuming that the public realm and infrastructure improvements are undertaken as proposed, and that high quality gap funded development is undertaken, this should change investors’ perceptions of Lillyhall and create confidence (assuming current macro economic situation returns to some normality) that Lillyhall is the location for businesses to locate to in West Cumbria. Rental and capital values should then increase, negating the need for public sector financial assistance.

14.37. The principal advantages of following this route are set out below:

- Capital receipt is obtained within a fixed period specified within the development agreement;
- An uplift in site value for the stakeholders could be obtained by including provisions within the development agreement to adopt an open book policy, whereby overage is paid in addition to the agreed base land price in the event that the profit from development exceeds a pre-agreed level of priority return to the developer. A reduction in actual build costs or increases in value or a combination of both could crystallise a “super profit” which in the absence of such an agreement would benefit the developer. In the majority of overage provisions the “super profit” element would be shared equally however this is very much subject to the negotiation strength of each party;
- A specified physical product is created that meets agreed environmental/sustainability criteria. As the majority of the development land is owned by NWDA it would have the ability to invoke its requirements upon any proposed development. This may include meeting any environmental/sustainability requirements. Currently based upon

14.38. The main disadvantages of following this route are:

- Does not capitalise on any in-house specialist property resource;
- May not allow opportunity to fulfil regeneration and sustainability aims in a holistic manner;
- NWDA could receive a lower capital receipt if unconditional bids are sought, as planning permission is not in place in many cases;
- Higher disposal costs for single plot sales;
- Fragmented ownership could lead to variable management and presentation of the Estate, and long-term management difficulties;
- Implications for cost and management time for negotiating terms in respect of every site;
- Only one capital receipt received for each site unless overage provisions are included in the contract documentation; and
- Latent values of sites may not be realised by stakeholders as plots are sold on, and only a fraction of the return is received, rather than
profit share from the whole development cycle. With this route, stakeholders only benefit from land receipt and potentially overage on individual development land disposals, rather than securing a share of profits resulting from development activity across the whole of the site which is one of the advantages of pursuing the creation of a joint venture public/private vehicle.

14.39. This procurement regime would apply only if the stakeholders are prescribing what they require from the developer over and above planning requirements.

Option 3 – Engagement of a Masterplan Developer by way of Development Agreement

14.40. This would be a contract or series of contracts between the NWDA as main development landowner and a Masterplan Developer setting out how they will bring forward development of the wider site with the early emphasis being on land within the NWDA’s control.

14.41. A key requirement would be to attract a development partner with a long-term vision to bring forward the development, and a financial appraisal that demonstrates returns to the private sector development partner.

14.42. Where there is fragmented ownership of the wider site, such as at Lillyhall, there needs to be sufficient financial attraction within the NWDA’s land to engage the private sector (this is subject to market conditions which at the time of drafting this report are not favourable).

14.43. The main advantages of this option are:

- The NWDA would be dealing with one Masterplan developer;
- The Masterplan developer can work with the public sector stakeholders to agree the detailed phasing strategy for Lillyhall, and
- No requirement for the creation of a corporate vehicle.

14.44. The main disadvantages are:

- Does not capitalise on any in-house specialist property expertise, and
- Fragmented ownership of the wider site may disincentivise the private sector if there is insufficient viability within the existing NWDA land.

14.45. Given the long-term nature of any Masterplan developer arrangement, the Masterplan developer will need to be procured through the competitive dialogue process, commonplace in arrangements of this nature.

14.46. There are a number of ways in which the stakeholders may wish to structure a corporate joint venture with a development partner. For example: a local asset-backed, vehicle-type arrangement whereby the NWDA makes its assets available to the vehicle as a mechanism to lever-in matched private sector finance, expertise and capacity. The local asset-backed, vehicle-type of arrangement can provide benefits in terms of holistic regeneration and commitment through a corporate partnership arrangement. This option focuses upon the key elements of that structure for the purposes of this report.

14.47. This route would involve the creation of a public/private partnership vehicle (PPP) between the public sector landowner (NWDA in respect of Lillyhall) and its procured private sector partner, who may be a co-investor or development partner (or a hybrid).

14.48. The PPP could operate as follows:

- The NWDA selects a private sector partner;
- The NWDA and its private sector partner form a joint venture partnership vehicle (the PPP);
- The NWDA transfers its assets into that PPP vehicle for the PPP then to bring forward the development - either directly or by passing contracts to the market. The consideration for the assets can be a combination of equity/quasi equity and subordinated debt payable over the life of the PPP;
- The value of those assets forms a benchmark for private sector finance effectively to “match” the public sector equity/quasi equity contribution. In principle therefore, the value of NWDA’s assets could lever in match funding to the PPP; and
- The private sector partner (or member of its group) provides estate management/development management services to the PPP, pursuant to a service level agreement and in consideration of a fee payable by the PPP to the services provider.

14.49. The NWDA and its partner in the PPP would then benefit from any sale proceeds/income flowing up to the PPP following development and sale.
14 Delivery & Funding

14.50. The PPP acts as “master developer” and can engage with other developers for the delivery of subsequent phases.

14.51. Activity depends upon the type of partner which the NWDA requires. If a co-investor, then the co-investor will be bringing funds into the PPP as matched equity finance alongside the public sector assets. The PPP could then determine how to bring forward phases and procure development partners on a phase by phase basis. The co-investor may also wish to undertake some development.

14.52. Key requirements of this option would be:

- A critical mass of assets (property / funding) which would attract private sector investment. Whilst NWDA hold substantial land interests at Lillyhall these are of relative low value taking current land values into consideration and would not in their own rights deliver sufficient match funding to the PPP;
- If other funding was also capable of being introduced to the PPP by the public sector this would obviously increase the attractiveness to the private sector;
- Selection of a partner who would bring forward the long-term vision for Lillyhall;
- A financial appraisal which shows demonstrable returns to the private sector partner; and
- A Partner with access to equity / loan finance and relevant expertise.

14.53. Main advantages of this option are:

- Sharing of risk with private sector partner;
- Retention of control over key areas by the public sector means that it can ensure the regeneration and sustainability objectives are achieved;
- The private sector’s expertise and funding commitment will permit the PPP to unlock the inherent value, spread risk and achieve its objectives – to achieve area wide regeneration;
- The development is of such a scale whereby some phases on the site maybe more risky than others, with the PPP approach allowing the private sector to take into account less risky future phases in its funding profile – i.e. cross-subsidy
- NWDA shares in value capture;
- Allows for greater flexibility, in that it is not necessary to state at the outset how additional land interests are introduced into the structure, as NWDA and the private sector partner would decide upon that at the relevant time (in their roles as decision makers within the PPP), provided the original scope of the procurement is wide enough;
- Ability for main PPP to enter into other joint ventures for specific site opportunities, e.g. A JV with the NDA;
- Increased access through the private development partner to funding to progress development projects (e.g. buying in third party land etc.);
- Ability for flexible structure so receipts to PPP can be recycled;
- Potential for partners to invest further cash and assets into the PPP once established;
- Ability to accelerate the release of value from the assets owing to private sector involvement driving the process forward at a quicker rate; and
- There is an opportunity to second / transfer staff into the new PPP to drive cost savings

14.54. The main disadvantages of this option are as follows:

- Creation of a corporate vehicle with associated administration costs. A corporate vehicle may be more difficult to wind-up than a contractual arrangement;
- Sharing of control – although control can be reserved back to the NWDA over key areas in the contractual documentation, if required;
- Potential conflict between the aspirations / objectives of the public sector and of the private development partner;
- Increased exposure to operational cost risk compared to the “do nothing” option;
- Potential issues from other private sector organisations viewing one organisation having control over public sector assets as being anti-competitive;
- Selecting the right partner to take forward a range of difficult assets; and
- Start up costs – because the establishment of a PPP has both corporate and property elements, the “set up” costs are likely to be substantial and may be irrecoverable.

14.55. The creation of a joint venture vehicle and transfer of land assets does not, per se, require an OJEU procurement. However, where there is the provision of goods, works or services back to the public sector and those goods, works or services exceed certain thresholds (currently £139,893 for Services and £3,497313 for Works which are fixed until the end of 2009), then consideration will need to be given as to the application of the EU public procurement regime. In a structure where a key element is the provision of services from the private sector partner (estate management, strategic asset management etc) then it is likely that a full OJEU public procurement will be required and that the procurement will be via the competitive dialogue route.
14.56. Having considered the various structures and mechanisms to deliver NWDA owned land disposals, as highlighted, above we would discount the following options as not being appropriate:

- Option 1 - Single Land Sale of all public sector held land - loss of control, no opportunity to fulfil regeneration and sustainability objectives, does not maximise land value, potential land banking frustrating development being taken forward.

- Option 3 - Masterplan Developer - Long term vision necessary, viability of development, fragmented ownership of wider site, procurement cost and risk (especially in current market).

- Option 4 - Joint Venture - Public /Private Corporate Vehicle - High set up costs, relative low value of NWDA land assets, risk in choosing right partner with long term vision and stamina for delivery given likely timescales involved.

14.57. In conclusion, Option 2 that follows the tried and tested model, whereby NWDA procures development partners on a plot by plot basis, via individual development agreements with the private sector, or by undertaking direct development in conjunction with other public sector partners, would be the most advantageous delivery model. This approach would also accord with the NWDA being part of the Strategic Development Partnership in relation to delivery of the Masterplan Vision. NWDA land ownership will be a primary component of the SDP asset strength.

14.58. In the short term and given the current economic climate and property market conditions, we anticipate that the public sector will have to continue to invest directly in bringing forward development at Lillyhall on NWDA owned land.

14.59. Private sector interest has previously been shown in the opportunities available at Lillyhall, to deliver a range of office, light industrial, and mixed use development. Whilst the market has declined since a number of these proposals were received, it does highlight that Lillyhall is an attractive location to potential developers, and it is likely that this interest will be renewed once the macro economy and property market improves.

14.60. Capitalising upon this interest in the medium term with the benefit of an adopted masterplan framework will achieve many of the objectives sought by the stakeholder group, delivering high quality, speculative and bespoke business accommodation. Reliance upon “gap” funding is likely to prevail in the short / medium term given the relative low rental and capital values in West Cumbria.

14.61. Whilst the Lillyhall Project Manager and Britain’s Energy Coast West Cumbria would be the most appropriate parties to promote delivery of the Lillyhall Masterplan, it may not however be the most appropriate vehicle to undertake the overall long term management of the enhanced public realm and general marketing.

14.62. Clearly it will be necessary to define what physical areas of the estate would be the subject of future management and maintenance proposals. Definition of the public realm is critical in consideration of future options.

14.63. It is worth noting that in the case of adopted areas the County and Borough Councils have statutory obligations and responsibilities. Certain elements of Central Government funding are determined by the amount of adopted areas that have to be dealt with. A reduction in such areas results in a reduction in income which can be unacceptable to a Local Authority. The table below illustrates the different categories of public realm and associated management obligations.

<table>
<thead>
<tr>
<th>Element</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Realm – those elements such as highway which are in public control and ownership. Includes areas which are formally adopted.</td>
<td>These elements are in the control of CCC or ABC and maintenance is provided through the collection of Business Rates. It is assumed that in the majority of cases these areas are adopted and maintainable at public expense. However, enhanced public realm at Lillyhall is currently maintained by the Lillyhall Partnership.</td>
</tr>
<tr>
<td>Public – Private Realm – in larger development schemes areas are often made available to the general public, but remain in private ownership and control.</td>
<td>The owner / developer has put in place management regimes together with mechanisms for collection of service charges to cover the cost of services provided.</td>
</tr>
<tr>
<td>Private – Private Realm – areas which are only accessible by those permitted (tenants or occupiers)</td>
<td>Private areas within individual sites which are only accessible by tenants or occupiers.</td>
</tr>
</tbody>
</table>
Management & Maintenance Mechanisms

14.64. The implementation of a management and maintenance regime within Lillyhall is going to be determined by:

• The nature of the services to be provided;
• Where funding could be secured from; and
• The role that the public sector wish to take.

14.65. The above issues are interrelated. Decisions will need to be made on an informed basis after consultation. In terms of mechanisms the following are the principle options:

Public Sector Led

14.66. The Lillyhall Partnership presently maintains the main common areas at Lillyhall through income generated from the letting of West Cumbria House. It is beyond the scope of this Masterplan to investigate whether the resources and budgets currently available could maintain an enhanced public realm. Budgetary pressures in the future may impact upon delivery of the services required to maintain an enhanced public realm. Consideration will need to be given to whether existing maintenance services are provided on a responsive basis and driven by the requirement to prevent health and safety issues. Future services are likely to require an improved service to ensure that the ongoing aesthetic quality of the enhanced public realm is maintained.

14.67. An alternative to this can be proposed, especially if public sector assets are used to generate funding towards future services. This could involve an entity which can take responsibility for providing the services/works thereby being accountable for spending public revenues. Three options would require consideration:

• Create a new management entity – this could be a post (or a team) created specifically to perform agreed functions and be accountable. For example Lillyhall Estate Manager using public funds to maintain public and public–private realm;
• An existing entity, for example, the Workington Town Centre Management Organisation extends its role to include this area; and
• Not for profit management company could be set up which would be a public-private entity that can administer funds and management services.

14.68. The latter option is worth considering where the likelihood of funding may be secured from public assets. Whilst NWDA control significant parcels of development land at Lillyhall, there is to the best of the consultant’s knowledge, no ground rental income received from the Agency’s land interests which could be used to provide funding. The critical issue is the ring fencing of revenue into the longer term, if revenues are not secured the programme could lapse.

Business Improvement Districts (BIDs)

14.69. Where there are limited or no service charge recovery options open to the major landowner and where they are providing estate management and other services that benefit occupiers in the wider area such as at Lillyhall, then an option to consider going forward would be to propose the setting up of a Business Improvement District.

14.70. This is a partnership between the local authority and local business community to develop projects and services that will benefit the trading environment within the boundary of a clearly defined commercial area. Although most of the established UK BIDs are within town centres, the principle works just as well in other places and there are BIDs in established industrial estates similar to Lillyhall across the UK.


14.72. NWDA has produced a BIDs Toolkit entitled Business Improvement Districts (BIDs) An Introduction and Guide which is downloadable from the NWDA website www.nwda.co.uk

14.73. The National BIDs Advisory Service is also a valuable source of information on Business Improvement Districts. www.ukbids.org

14.74. The following information is provided by the National BIDs Advisory Service and sets out the key aspects of a BID and their achievable benefits:

• BIDs allow businesses in a defined area and business sector(s) to vote on which additional services they want to invest in, to improve their trading environment;
• The vote is open to tenants - if a majority, both by number and by rateable value, approve the proposal, all ratepayers will contribute through their business rates;
• BIDs give local businesses the power to effect changes that will benefit them in their local community. Improvements may include extra safety/security, cleansing and environmental
measures, improved promotion of the area, improved events, and greater advocacy on key issues, but the legislation does not put a limit on what products or services are provided;

- Businesses have the opportunity to agree on the projects for which they are contributing and to vote in a ballot on the amount of money they are prepared to raise, enabling them to become involved in the administration of the schemes themselves;
- BIDs are operated by not-for-profit partnership organisations;
- The interests of large and small businesses are protected through a system which requires a successful vote to have a simple majority in both votes cast and rateable value of votes cast;
- Businesses must be able to sustain the additional cost - if they are not viable the BID can levy in order to raise enough income to make it a worthwhile venture;
- Once voted for, the levy becomes mandatory on all defined ratepayers and is treated as a statutory debt;
- The plan voted for has a lifespan of 5 years and further proposals will have to be reaffirmed through a vote; and
- Local Authorities play an important facilitating role and in particular are charged with legal responsibilities, including the provision of the ratings data to calculate the BID levy, the collection and enforcement of the BID levy via a ring-fenced BID Revenue Account that is then passed straight to the BID company, the organisation of the formal BID ballot, and the preparation and commitment to the baseline service agreements.

14.75. Achievable benefits and who can gain:

Existing Lillyhall Businesses and Employees:

- Produces economic well being and economic growth in area;
- Attracts inward investment;
- Gives competitive regional advantage;
- Produces social well being / improves quality of life;
- Develops partnership between private & public sector;
- Encourages corporate social responsibility;
- Provides sustainable investment for ongoing capital projects / services; and
- Creates a positive sense of place and enhanced feeling of safety and well-being.

Businesses / the Occupier:

- Reduces costs (crime reduction, joint activities, e.g. promotions / marketing);
- Is flexible to address the issues of individual sectors;
- Gives businesses a local voice;
- Creates more appealing environment for employees;
- Fair to smaller businesses;
- Fair system, those that invest, benefit – no freeloading;
- Can decide and vote for action before making the investment; and
- Can control process, monitor results and terminate it easily – flexible.

Local Authorities:

- Harnesses private sector management/ organisational drive and skills;
- Promotes greater understanding of the role of Local Authorities;
- Provides new, sustainable investment and doesn’t detract from other resources; and
- Has commercial support.

The Landlord:

- Assists capital value growth;
- Increases rental values of property and area;
- Increases an area’s desirability and attracts occupiers; and
- Increase in trade which affects turnover based rents (some retail);

- Good PR for company locally and regionally; and
- Forges positive links with Council.

14.76. There are established BIDs set up at the following North West Industrial Estates

- Winsford Industrial Estate, Winsford, Cheshire - www.1-5bid.co.uk
- Bolton Industrial Estates - www.iepbid.org.uk
- Astmoor Industrial Estate, Runcorn- www.astmoor.org.uk
- Halebank Industrial Estate Widnes
- Blackburn EDZ Industrial Estate - www.blackburnedzbidd.co.uk

14.77. Generally a business rates levy of circa 1% - 2% is capable of being raised to fund improvements that the BID organisation agrees to invest in. As mentioned above the businesses must be able to sustain the additional cost – if not the BID levy does not raise enough income to make the BID viable.

14.78. The occupiers at Lillyhall would need to be balloted to establish whether there is a majority of occupiers (over 50% of the occupiers that vote) that would support the setting up of a BID. The benefits of setting up the BID would need to be clearly set out and what could be included that would allow the businesses to
14 Delivery & Funding

14.79. Indicative costs of setting up a BID are in the region of £50,000 - £100,000. These costs could be met through

Estate Management Company

14.80. In contrast to the former options, an alternative which can be either private or public sector led is the setting up of an Estate Management Company.

14.81. The company can be limited by guarantee and would have a board which would set the objectives and activities of the company through a member’s agreement. The board could be made up of a mixture of:

- NWDA;
- BECWC;
- Cumbria County Council;
- Allerdale Borough Council;
- Landowners / Developers; and
- Occupiers.

14.82. The company would be a not-for-profit organisation recycling surpluses back into its activities.

14.83. There are various legal issues that public sector members would have to consider before embarking upon setting up an Estate Management Company particularly around controlling or influencing interests which could affect the accounting position and may mean that the company would be subject to certain proprietary controls. For example, a company will be regarded as controlled if a local authority controlled more than 50% of the shares or voting rights. Legal issues such as these would need to be considered further by NWDA, the local authority and County Council before embarking down this avenue.

14.84. The precise make up and structure of the company cannot be established until the parties have considered fully their role and full extent of duties.

14.85. We would anticipate that shares would be distributed between those landowners who have agreed to contribute towards the Estate Service Charge. For the purposes of equity it would be appropriate to have representation from a number of tenants (who are essentially paying the charge) on the board, perhaps in a non executive way to ensure buy in.

14.86. Funding of the activities of the Company could come from a variety of sources such as revenue from public sector assets and the actual provision of services. To avoid state aid complications with public sector funding input, it would be appropriate for the public sector to be represented on the Board of the company and that expenditure is carefully regulated on specific permissible elements. As mentioned above, the company would be a not-for-profit organisation.

14.87. Services to the company could be provided directly by the company through direct employment; other specialist service providers who would have to commercially compete for the business to ensure best value for money; or through negotiation of a service level agreement with Allerdale Borough Council or Cumbria County Council to provide specific services.

14.88. The Highways Authority for example could agree with the Estate Management Company that the Estate Management Company could provide the difference between basic services to be provided to adopted areas, and enhanced services to those areas e.g. maintenance of public art, enhanced street furniture etc. How the cost of providing these services is recovered would need to be considered in detail.

14.89. The Estate Management Company would need legal agreements with the County Council in terms of being able to undertake works and services to adopted public realm. These will require careful drafting as there will be perceived risks by both parties.

14.90. In any event a detailed risk analysis would need to be undertaken as part of a more detailed appraisal in considering the most appropriate option to follow. This goes beyond the scope of this Masterplan and requires detailed legal input. Issues such as State Aid, additionality and services to be provided are matters that would also require further consideration.

Private Sector Perspective

14.91. Developers, landowners and occupiers will all have different views regarding the issue of management and maintenance of public realm. Given the fact that the cost is perhaps the main issue, the occupier’s perspective is the most relevant as they would be picking up the cost either through a service charge or levy (e.g. if a Business Improvement District was designated).
14.92. The key issues to be considered from a private sector perspective are:

- Value for Money - the range of services will need to be attractive to help encourage buy-in;
- Occupiers will be reluctant to increase their occupational costs, there will be a reluctance to agree to pay more; and
- Occupiers will argue that public realm management and maintenance is already provided through the collection of business rates.

14.93. Achieving buy in from occupiers on a voluntary basis will be very difficult. An increase in occupational costs could also be seen as a potential disadvantage to locating to Lillyhall.

**Additionality and Freeloading**

14.94. As mentioned above occupiers will use the argument that they are already paying for certain services through business rates and other taxation. To challenge and overcome this, the levels of service need to be significantly additional to those already provided by the local authority or County Council. Further detailed research and survey work would be needed to scope out such additionality working with occupiers and landowners.

14.95. Turning to freeloading, we are mindful from previous experience that where initiatives like this are introduced certain parties will not participate and this actually acts as a disincentive to others. It will be argued that why should some pay whilst others benefit for nothing. Whilst the majority of older developments at Lillyhall do not allow for collection of an overall estate service charge several developments have recently been completed where service charges have been included in lease agreements. It is likely that occupiers of these schemes will:

- Not wish to participate because they are in a ‘new’ development.
- Argue that others are not participating
- That the mechanisms are in place in service charges and other agreements to allow collection.

**Sources of Funding for Estate Management**

14.96. Potential sources of funding to deliver Estate Management functions could include:

- Revenue generated from Land Assets;
- From collection of S106 payments (Refer to Section 12 for further detail);
- Council resources devolved to Area Committee to administer;

14.97. It will be necessary to undertake a more in depth assessment of the options that are available to fully develop an estate management strategy for Lillyhall. Given the fragmented land ownership within the estate, and the likelihood that many of the existing owners or occupiers will not be enthusiastic to increase their occupational costs in the current economic climate, it is important that the clear benefits of adopting an estate service charge across Lillyhall are identified to secure private sector buy-in.

14.98. It is important that NWDA, as the major development landowner at Lillyhall, continues to include appropriate legal arrangements in any development leases granted to developers or end users to ensure recovery of service charges, to defray the cost of maintaining and managing the public realm. Developers should be under an obligation to pass on this responsibility to building occupiers in any sub-lease or sale agreements.

14.99. It is not possible to enforce such payments from existing occupiers or landowners, where there is no legal basis to enforce this, and as such it will be necessary to embark upon a consultation exercise with existing landowners and businesses to seek a contribution from them by negotiation. Adoption of the unadopted existing private estate roads, by the highway authority, would enable the authority to secure financial contributions towards the public realm management from occupying businesses through business rates. However, as mentioned earlier in this section, the setting up of a Business Improvement District (BID) for Lillyhall could enable recovery of the costs of public realm management as one of a number of initiatives put in place to promote and enhance Lillyhall, through a levy on business rates.
14
Delivery & Funding

Potential funding opportunities

14.105. Initial investigations into potential sources of public sector funding to implement the Masterplan have been reviewed. Opportunities for funding may come from a variety of organisations as set out below:

NWDA

14.106. A review of Strategic Regional Sites has been undertaken by NWDA and Lillyhall is included within the revised list. Strategic Regional Sites are a priority for NWDA single pot funding, where either market failure can be demonstrated or significant infrastructure costs cannot be wholly funded by the private sector. Any applications would need to be progressed through BECWC.

European Regional Development Fund (ERDF)

14.107. The North West Operational Programme 2007 – 2013 has apportioned the funding through a series of Priorities and Action Areas. Action Area 3.2 “Developing High Quality Sites and Premises of Regional Importance” allocates approximately £67m to this Action Area (£35m to Merseyside and £32m to the rest of the North West) for the delivery of Regionally Significant Strategic Sites (of which Lillyhall is one). Only the 33 listed sites are eligible for funding, and the following criteria should be used:

- Only those sites where there is a strong market failure argument for intervention should be supported;
- The sites need to have the potential directly to encourage the expansion of the region’s knowledge economy and high value sectors, rather than being for general industry or distribution uses; and
- The sites should be close to or have the potential to provide employment to areas of regeneration priority.

14.108. The rationale for including Lillyhall as an additional strategic employment site, over and above the list contained in the Regional Economic Strategy 2003, is that it aligns generally with the spatial principles and priorities in the Regional Spatial Strategy (RSS) and also aligns with the sub regional policy framework. The rationale goes on to state that “Lillyhall will support the regeneration of Cumbria by providing space for indigenous industries to grow and by attracting inward investment in an area of regeneration need”. The site will:

Recommendation

Management

14.100. Future funding of estate management in the short to medium term is likely to be undertaken by NWDA and the Lillyhall Partnership given the lack of any formal agreement (other than existing leases with service charge elements) with the wider Lillyhall business community.

14.101. A longer term intention of setting up a Business Improvement District would in our opinion provide the best opportunity of achieving across the board funding of estate management for Lillyhall, as a levy upon business rates would be mandatory. We do not believe that the setting up of an Estate Management Company, which would be reliant upon the buy in of all business occupiers, is practical and freeloading is likely to occur as many occupiers decide that they do not wish to join the company, which would make it inequitable upon those that do see the benefits.

Marketing

14.102. The marketing of the Lillyhall brand to promote the benefits of the location, businesses located there and the availability of land and premises should, in the consultant’s opinion, be undertaken by the delivery vehicle chosen to deliver the Masterplan proposals. In this regard the SDP or the Lillyhall Partnership supported by Britain’s Energy Coast West Cumbria, would be the most appropriate organisation to take on the responsibility of the marketing of Lillyhall.

14.103. Marketing would require the preparation of a detailed costed marketing strategy to be implemented over say a three year period. The strategy would confirm responsibility for delivery of marketing, how it is going to be delivered, what it will cost, and how it will be funded.

14.104. The preparation of a brief to secure proposals from appropriate marketing organisations to prepare a marketing strategy for Lillyhall, should form part of the business plan for the delivery of the Lillyhall Masterplan.
• Provide quality jobs for the sub-region, and Act as a focus for high quality indigenous growth and investment, particularly related to the nuclear industry.

14.109. The use of ERDF to fund highway improvements alone would not be deemed to be an appropriate use of these monies, and as such, justification for funding will need to be linked to bringing forward land for development (for example under Action Area 4.3, “Supporting Employment Creation for Areas of Regeneration Need”) particularly where a strong market failure argument can be justified.

JESSICA Urban Development Fund

14.110. JESSICA is an initiative of the European Commission, which is being delivered on their behalf by the European Investment Bank (EIB). JESSICA stands for Joint European Support for Sustainable Investment in City Areas and has been designed to facilitate better alignment of European Regional Development Funds (ERDF) and private funds to maximise the effective delivery of structural funds programmes. JESSICA may provide a suitable project in which the UDF could invest and we would recommend that further investigation is undertaken by the stakeholder group to ensure Lillyhall is promoted at the highest level.

Sellafield Socio-Economic Development Plan

14.112. Sellafield Ltd and the Nuclear Decommissioning Agency (NDA) published their Socio-Economic Plan 2009/10 in February 2009. It states that they anticipate at least 80% of their annualised funds (£2.4m) will be made available to support transformational projects from 2010/2011, dependent upon WLR / BECWC achieving continued high delivery performance.

14.113. NMP (Nuclear Management Partners, who now manage Sellafield Ltd) recently announced a £20m package of funding, to be aligned with the socio-economic funding from the NDA. They state “Nuclear Management Partners is determined to be an active partner in the development of the Energy Coast Masterplan and we want this funding to be used for what the community wants, not what we think it should have.”

West Cumbria Development Fund (WCDF)

14.114. WCDF is a partnership between the CCC, Sellafield Ltd and Allerdale and Copeland District Councils. It is dedicated to supporting the economic development of West Cumbria. In addition WCDF underwrites the operating costs of West Cumbria Development Agency Ltd which provides business advice and helps businesses access funding for growth and expansion.

14.115. It also offers loans for business start-ups and expansion in the west of the county and invests in long-term economic improvement projects.

Cumbria County Council

14.116. Where highway improvement works are necessary to improve safety to a principal highway or trunk road, then funding could be secured from either the County Council or Highways Agency, depending upon the road hierarchy.

14.117. The justification for improvements on safety grounds would need to be made as part of any Masterplan implementation strategy. Appropriate joint working is recommended with the County Council as the Local Highways Authority to establish whether funding would be available as Lillyhall develops into the future.

Homes & Communities Agency

14.118. The Homes & Communities Agency (HCA) is one of the partners providing funding and other resources to the four delivery boards set up in Cumbria to deliver new housing and economic development. Discussion with the HCA has confirmed that they would not look to invest any funding directly into the regeneration of Lillyhall as this project is primarily focussed on physical economic development which does not fit with their core priorities for investment, these being primarily focussed upon new housing provision. However, if Britain’s Energy Coast West
14 Delivery & Funding

Cumbria were to become the vehicle to deliver the Masterplan vision and this subsequently formed a project within its annual business plan, then as one of the funding partners to the delivery board, the HCA would be providing indirect funding to the project via its investment in the Delivery Board. The HCA confirmed that they would see NWDA taking the lead in funding the delivery of the Lillyhall Masterplan.

14.119. The HCA can invest in the provision of public realm where this contributes to ‘place making’. Whether any of the public realm works contained within the Lillyhall Masterplan would be eligible for HCA funding in this instance would need to be fully investigated by the Masterplan Stakeholders.

Private funding sources

14.120. It is considered that a usual source of short term funding – short term bank borrowing - to fund development on a project by project basis is extremely difficult in the current market and the borrower will need to put in substantial equity.

14.121. In terms of medium to long term a common approach would be mortgage funding – i.e. a commercial mortgage to fund property acquisition for owner occupation or investment. Again, substantial equity will be required in the current market.

14.122. Participation in equity could be achieved through taking a share in a vehicle set up to develop/deliver e.g. Public Private Partnership.

14.123. The consultants are not aware of any institutional investment at Lillyhall i.e. pension fund/insurance ownerships, and consider it unlikely that any sovereign wealth fund would want to invest in Lillyhall.

Recommendation

14.124. It is likely that the principal sources of funding to implement delivery of the Masterplan will come from NWDA / BECWC and ERDF, however other funding opportunities should be fully investigated through the organisations listed above once a detailed business plan has been formulated.
15. Conclusions & Next Steps
15.1. Delivering the Lillyhall Masterplan, especially in its early years, will require major effort by NWDA and its partners. This section of the report summarises ways in which this can be achieved, together with key recommendations to be used within and progressed through the planning system, as well as advancing the creation of an appropriate delivery vehicle.

15.2. Design, branding, engineering, planning and delivery / funding future activities identified in this report are all interrelated. Action should be progressed in parallel with overall management and risk mitigation controlled through a Lillyhall Project Manager (see section 14).

### Design and Branding

15.3. One of the most important ‘next steps’ is the creation and agreement of the brand for Lillyhall. This Masterplan recommends that the Estate is referred to as ‘Lillyhall’, with an appropriate supporting strapline – Energy – Delivery – Space. The strapline and rationale defining the brand has been detailed within the Masterplan documentation. The agreement and subsequent promotion of the brand to landowners and developers, both internal and external, will be one of the tools used to market Lillyhall with clear aims and objectives providing landowners and developers’ certainty and confidence.

15.4. In conjunction with the brand and in addition to the design advice set out in section 7 of this Masterplan, a Design Prospectus has been developed as a stand alone document which provides development proposal guidance in respect of built form, open space, public realm and security on NWDA owned land. Moving forward the Design Guide element of the Design Prospectus may be adopted for use as a material consideration by the Local Planning Authority in order to inform development decisions.

### Engineering Future Surveys

15.6. Much of the engineering and infrastructure work identified in this report is dependent on third party information and more detailed studies, specific to individual sites. The main future actions required are summarised below:

- Development of a Lillyhall Travel Plan;
- Detailed utility services surveys, specific to individual sites;
- Definition of the legal status of existing utilities including any private connections;
- Ground investigation including soakaway testing and drainage connectivity; and
- Continuing consultation with CCC planning archaeologist and potentially a Level 2 Archaeology Survey.

### Planning Strategy

15.7. Working with the Local Planning Authority to ensure that Lillyhall is allocated as a strategic site in their emerging Core Strategy, will allow the Masterplan to progress towards adoption as a Supplementary Planning Document in the longer term. This approach will require a full public consultation process, with comments fully taken into consideration and any emerging issues responded to and amendments made to the Masterplan if necessary. In the short term however, NWDA should work with ABC as key consultees on planning applications at Lillyhall, using this document and the associated Design Prospectus to formulate responses. In particular, as previously stated, the Design Guide element of the Design Prospectus, should be approved as a material planning consideration by ABC.

### Masterplan Early Wins

15.8. In terms of ‘early wins’, the Masterplan recommends that investment in infrastructure and public transport is made and a programme of public realm works along the A595 and at key gateways is implemented. These measures will help to create a step change in the physical environment and will act as a qualitative threshold which is both recognisable and attractive to the private sector.

15.9. Lakes College is progressing development proposals for a new construction centre. This must integrate with the offer at Energus and the University of Cumbria’s plans to develop a CERESE adjacent to Energus. Coordination between these projects alongside the Local Hub and student accommodation is critical to the realisation of this masterplan.

15.10. It is understood that Private Developer proposals for a mixed use scheme at Lillyhall North are due to come forward in the near future. NWDA as landowner should utilise the Design Prospectus to guide the approach to development in close consultation with both the developer and the Local Planning Authority. Matters raised in the Design Prospectus will be important considerations in these discussions.

15.11. The Lillyhall Partnership intends to progress with proposals for the development of managed workspace which will also be an important early project.
15 Conclusions & Next Steps

Next Steps

15.12. Key next steps therefore will include the following:

• The further development of Britain’s Energy Coast West Cumbria as the key organisation with responsibility for leading on and co-ordinating delivery;
• Formation of a detailed business plan;
• Development Briefs for key sites; and
• Preparation of a detailed costed marketing strategy to be implemented over say a three year period.

Conclusion

15.13. Over and above the steps set out above, it is important to appreciate that the Masterplan is a flexible blueprint for the future. It is prescriptive in certain areas but also recognises that within a 20 year timeframe, there will inevitably be external influences that are not known at this time which will have a significant impact on the final form of the physical place.

15.14. Nevertheless, it is extremely important that the fundamental positive attributes of this Masterplan in terms of creation of an environment that will help deliver Britain’s Energy Coast™ Masterplan, as well as providing significant employment and education opportunities, whilst at the same time providing a positive contribution to the wider context, can and should be achieved at Lillyhall.