Wokingham Borough Council

Topic Paper: Employment

Wokingham Borough Local Plan Update: Proposed Submission Plan (Regulation 19)

September 2024



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1. Introduction

- 1.1 The purpose of this topic paper is to provide background to the economic strategy and policies in the Local Plan Update (LPU): Proposed Submission Plan (September 2024).
- 1.2 In doing so, it sets out the national and local policy context, the need for future economic development in the borough, and the proposed strategy and sites to help meet this need.

2. Background and policy context

- 2.1 The National Planning Policy Framework (NPPF) sets out the context within which local plans must be prepared. The NPPF is supplemented by a series of Planning Practice Guidance (PPG).
- 2.2 With regard to employment, the NPPF is clear that planning policies should:
 - a) set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration;
 - b) set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
 - c) seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and
 - d) be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances. (Paragraph 86)
- 2.3 The Planning Practice Guidance sets out further information on how authorities can determine the type of employment land that is needed, and how market signals can be used to forecast future need. It states:

Strategic policy-making authorities will need to prepare a robust evidence base to understand existing business needs, which will need to be kept under review to reflect local circumstances and market conditions. National economic trends may not automatically translate to particular areas with a distinct employment base. Where appropriate, local planning authorities can use their Authority Monitoring Report and the plan review process to ensure that their evidence base remains up to date.

Functional economic market areas can overlap several administrative areas so strategic policy-making authorities may have to carry out assessments of need on a cross-boundary basis with neighbouring authorities within their functional economic market area. Local Enterprise Partnerships (and county councils) can play a key role in this process. (Paragraph: 025 Reference ID: 2a-025-20190220)

Economic context of Wokingham Borough

- 2.4 Wokingham Borough is in the heart of the Thames Valley, recognised as the UK's most productive sub-region. The borough plays an important role in the continued economic success of the Thames Valley and is home to many multinational corporations with expertise across the key sectors of digital technology, life sciences and healthcare, and energy and environment, alongside a highly skilled workforce. Thousands of smaller businesses together ensure the borough's economy remains buoyant and attractive to investors.
- 2.5 The Berkshire Local Industrial Strategy (BLIS) (2020) highlights the importance of maximising the geographical advantages of the Thames Valley at both a global and a local level. The BLIS has a vision that 'Berkshire should grow with ambition and intent to harness the best of both global and local'. From this it identifies six overarching 'priorities' to create a sustainable economy, that accelerates growth that is smart, knowledge intensive, inclusive and resilient. As this strategy is still being implemented, the Local Plan Update can help support opportunities for long-term economic growth in these sectors.
- 2.6 For this economic success to continue, it is important to respond to the changing needs of the labour market. This includes the need for affordable, quality housing, flexible workspaces and an integrated and connected borough that allows businesses to adapt. A borough where people want to be and stay. At a local level this ambition is outlined in the council's 2035 Vision, which highlights the importance of a strong local economy which adapts to the needs of communities to help deliver economic success. The emerging Wokingham Borough Economic Development Strategy further sets out a series of actions and interventions at the local level around four key themes with the aim of improving the borough's offering as a location to live, work and do business.

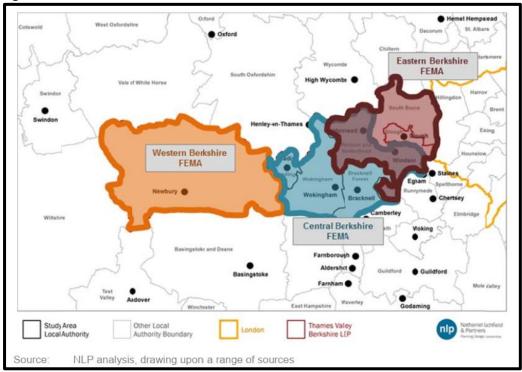
3. Future employment needs

- 3.1 To better understand the functional economic geography of the area, the Thames Valley Berkshire Local Enterprise Partnership (TVBLEP) and the six Berkshire authorities commissioned a study to investigate economic relationships, linkages and flows which characterise the sub-regional economy. The Berkshire Functional Economic Market Area Study (FEMA) (2016)² defined three core functional economic market areas, based on a 'best fit' to local authority boundaries due to their consistently strong inter-relationships:
 - Western Berkshire FEMA comprising only West Berkshire District.
 - Central Berkshire FEMA comprising Reading Borough, Wokingham Borough, Bracknell Forest Borough and the Royal Borough of Windsor and Maidenhead.
 - Eastern Berkshire FEMA comprising the Royal Borough of Windsor and Maidenhead, Slough Borough and South Buckinghamshire (which now forms part of wider Buckinghamshire).

¹Berkshire Local Industrial Strategy: https://www.thamesvalleyberkshire.co.uk/getfile/BLIS%20-%20locally%20approved%2024%20October%202019.pdf

² Berkshire Functional Economic Market Area Study – Thames Valley Berkshire Local Enterprise Partnership (February 2016), available at: https://www.wokingham.gov.uk/planning-policy/evidence-studies

Figure 1: Berkshire FEMAs:



- 3.2 For the Central Berkshire FEMA, the report recognised the commercial markets along the M4 corridor, and the key markets of Reading, Maidenhead, Bracknell and Wokingham, including the strong economic relationships between the towns, notably in terms of value, accessibility and labour force.
- 3.3 A further report was commissioned to consider the objectively assessed economic development needs of the Central Berkshire FEMA. The Economic Development Needs Assessment (EDNA) (2016) considered the quantitative and qualitative floorspace requirements over the period 2013-2036³.
- 3.4 Employment uses for the purposes of the employment policies primarily relate to business, industry, distribution and storage uses (BIDS), based on the Use Classes Order 1987 (as amended 1 September 2020):
 - B2: General Industry
 - B8: Storage and distribution
 - E(g): Offices, research and development or light industrial.
- 3.5 To take account of more recent data, an Employment Land Needs Study (2020)⁴ was undertaken to assess the future employment land and floorspace requirements in Wokingham Borough, based on jobs forecasts and a specific scenario that relates to the calculation of Local Housing Need. The assessment aligns future jobs forecasts with population growth. The study considers net and gross demand, gross supply and the floorspace requirements across office and industrial uses needed to support economic growth in the borough over the plan period. 'Industrial' refers to both

³ Central Berkshire FEMA Economic Development Needs Assessment – Thames Valley Berkshire Local Enterprise Partnership (October 2016), available at: https://www.wokingham.gov.uk/planning-policy/evidence-studies

⁴ Wokingham Borough Council Employment Land Needs Study (January 2020), available at: https://www.wokingham.gov.uk/planning-policy/evidence-studies

warehousing and industrial (B1(c), B2 and B8) uses because in practice these activities are interchangeable and routinely require/occupy the same type of space.

- In 2023, an updated study, the Employment Land Needs Study (ELNS)⁵, was published. This supersedes the 2020 study and provides an updated assessment of the future employment needs in Wokingham Borough. This study takes into account recent changes to the economy and working practices, including increases in remote working, the growth of demand for warehousing and logistics space, alongside local changes such as the increased demand for film studio space.
- 3.7 The PPG provides three broad approaches to calculating future employment needs: projections based on past trends; an assessment based on labour demand (economic forecasts); and labour supply. These approaches are set out in more detail in chapter 5 of the ELNS.

Office needs

3.8 When considering the past trends approaches to calculating future employment needs, the ELNS notes that:

'For office – we do not recommend using a floorspace-based past trends approach because change in floorspace has been negative for the past ten years even though job change has been positive.' (Paragraph 5.33)

3.9 The ELNS also considers the labour supply approach to calculating future employment needs, stating:

The 'bottom line' for the labour supply is that given that the B/Eg class job generation from these additional workers will, as last time, be largely confined to people servicing activities, and account for less than 1,000 jobs, the impact of these additional jobs will in land terms be relatively minor, and not extend to a requirement anywhere near in excess of the past trend based assessments of demand. (Paragraph 5.84)

- 3.10 The ELNS therefore proposed calculating future needs for office development using an economic forecast based demand assessment based on forecasts from Experian. This turns the economic forecasts from Experian into an estimate of future demand for employment floorspace. This is set out in a five step process:
 - 1. Using the latest Business Register and Employment Survey (BRES) data calculating the proportion of office jobs within each of the 38 categories in the land uses and using economic forecast data to calculate the change in jobs.
 - 2. Calculate the floorspace required to support the office jobs.
 - 3. Turn demand from net to gross by accounting for future losses in the stock of premises.
 - 4. Identify the known future floorspace available for office uses, considering extant planning permissions and proposed plan allocations.
 - 5. Calculates the gross demand (I) and gross supply of floorspace (p) from the previous tables to calculate the 'balance.' (Set out in Table 1 below)
- 3.11 The conclusion from this five step process is set out below:

⁵ Employment Land Needs Review (March 2023), available at: https://www.wokingham.gov.uk/planning-policy/evidence-studies

Table 1: Office market supply balance, 2022⁶

	Balance	2022-40 (sqm)
Ι	Gross demand (sqm GIA)	30,761
р	Total supply (sq m GIA)	77,402
q	Over supply (sq m GIA)	46,641

Office summary

3.12 The ELNS summarises in paragraph 5.64 that:

'Neither approach (past trend or economic forecast) shows positive growth, and the large quantum of surplus vacant stock and the existing sites with planning consent means that in line with the finding of the 2020 Employment Land Needs study the only sensible conclusion is that there is no need to allocate more land.'

- 3.13 When considering the balance between demand and supply, including future commitments, the study found that there is no quantitative requirement for additional office land/floorspace as gross supply exceeds gross demand. The study therefore recommends there is no need to allocate any additional land for office use. The primary office locations of Green Park, Thames Valley Park and Winnersh Triangle continue to perform well despite changes in working practices and tenants.
- 3.14 Some lower grade office developments have experienced higher levels of vacancy, and pressure for alternative uses, including residential and more recently industrial. Given changes to the Use Classes Order, the council's ability to manage these changes has been reduced. The council will consider the use of Article 4 Directions to retain the integrity of Core Employment Areas where necessary.
- 3.15 It is important to note however that since the ELNS was prepared more recent employment commitments data is available, for the monitoring year 2022/23, and updated information regarding the proposed allocations in the LPU. Together this requires an update to the office market balance calculation. This is set out in section 4.

Industrial needs

- 3.16 Similar to calculating future needs for office, the ELNS considers the three methods to calculate future industrial needs. Tables 2 and 3 use past trends of industrial floorspace to calculate future industrial floorspace over the period 2022-2040.
- 3.17 As shown below, Table 5.6 projects future industrial floorspace needs based on the past change in job trends over the period 2009-2019.

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⁶ This replicates ELNS Table 5.11

Table 2: Projected industrial need (based on past trend jobs change 2009-19)⁷

		Total Industrial	p.a.
а	Past change (projected 2022-40)	4,666	259
b	Density factor (sq m GIA/job)	37.8	
С	Occupier demand (sq m GIA) [a*b]	176,331	
d	Vacancy factor (sq m GIA) [c*8.1%]	14,283	
е	Stock vacancy adjustment (sq m GIA)	22,264	
f	Net demand (sq m GIA) [c+d+e]	212,878	11,827
g	Net demand (hectare) [f@40% plot ratio]	53.2	3.0

3.18 Table 3 below is similar to Table 2 and does not apply the density factor, but does apply a stock vacancy adjustment, which calculates an industrial need for 12 ha.

Table 3: Projected industrial need (based on past trend floorspace change)⁸

		Total industrial	p.a.
a	Floorspace change (GIA sq m) (projected 2022-40)	26,979	1,499
b	Stock vacancy adjustment (sqm GIA)	22,264	
С	Net demand (sq m GIA) [a+b]	49,243	2,736
d	Net demand (hectare) [c@40% plot ratio]	12.3	0.7

3.19 The ELNS identifies that demand for new industrial land remains strong and that at the time forthcoming supply of industrial land was low.

⁷ Replicates ELNS Table 5.6

⁸ Replicates ELNS Table 5.7

Table 4: Industrial market balance9

	Balance	2022-40 sqm
h	Gross demand (sq m GIA)	17,164
k	Total supply (sq m GIA)	11,372
I	Under-supply (sq m GIA) [k-n]	5,792

3.20 The ELNS also considers the labour supply approach:

While there is an increase in demand for B/Eg jobs stemming from a forecast based on the Standard Method, and indeed the additional labour supply in the Borough identified by Census 2021, this only makes a relatively minor increase in the forecast based assessment of labour demand. This is especially the case compared to the past trends approaches to the need for industrial land. (Paragraph 5.89)

3.21 The ELNS then considers the economic forecasts approach, which is particularly relevant for the implications of the delivery of Shinfield Studios:

Job growth-based forecast – the overall positive warehousing job growth is more than matched by the forecast industrial job losses, but when the stock vacancy adjustment is factored in this generates an overall approximately 6 ha requirement – very similar to the 5 ha requirement in the 2020 ENLS.

The one-off economic boost from Shinfield Studios that will deliver in the region of 600 indirect industrial based jobs will require 6 ha. (Paragraph 5.89)

Shinfield Studios

- 3.22 Shinfield Studios has delivered 18 new purpose-built stages south of the M4 as part of an extension to the Thames Valley Science and Innovation Park.
- 3.23 The ELNS further discusses the implications and indirect job growth attached to the recent development of Shinfield Studios. The ELNS identifies that indirect jobs in the supply chain will be created in the short to medium term by the development of Shinfield Studios, which will be industrial in nature. In total, 1,500 indirect jobs were anticipated to be created, with 600 located in the borough. When the local job density factor is applied, this results in a net demand for a further 6.1 hectares of industrial land.

⁹ Replicates ELNS Table 5.14

Table 5: Shinfield Studios indirect job dividend¹⁰

		Indirect jobs
а	Jobs change	600
b	Density factor (sq m GIA/job)	37.8
С	Occupier demand (sq m GIA) [a*b]	22,676
d	Vacancy factor (sq m GIA) [c*8.1%]	1,837
е	Total occupier demand (sq m GIA) [c+d]	24,513
f	Stock vacancy adjustment (sq m GIA)	-
g	Net demand (sq m GIA) [e+f]	24,513
h	Net demand (hectare) [g@40% plot ratio]	6.1

Industrial summary

3.24 The ELNS considers the past trends, and economic forecasts based assessments to industrial land, and in paragraph 5.91 states:

'For the reasons set out above the minimum industrial need is for 18 ha – that being the need based on past floorspace change (12 ha) plus the immediate need to provide for the Shinfield Studios indirectly related jobs (6 ha) that will be required in the short to medium term, and are needed to ensure that these needs associated with the expanding TV/film sector do not displace the needs of the rest of the normal market. However, given we strongly suspect past industrial delivery has been constrained and the need for plans to be prepared positively, we recommend the Plan projects forward the ten-year past job change scenario that generates a need for 53 ha.'

- 3.25 A combination of the past trends and economic forecasts based assessment is therefore used to calculate the emerging needs.
- 3.26 In contrast to office needs, the ELNS found that there is a larger need for new industrial floorspace, with a minimum of 18 ha of additional land over the plan period. This recognises the existing low levels of vacancy, high job densities and very limited recent industrial floorspace losses.
- 3.27 The figure of 18 ha can be calculated in floorspace terms by considering the data in Table 5.7 (49,243 m²) and Table 5.15 (24,513 m²) of the ELNS. This results in a total need of 73,756m².

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¹⁰ Replicates ELNS Table 5.15

Updated Employment Needs

3.28 Since the preparation of the ELNS, more recent completions and commitments data is available for the year 2022/23 which can be factored into the calculation of future economic needs. This is set out in Table 6 below:

Table 6: Future Employment Needs

		Industrial (m²)	Office (m²)
Α	Identified needs (2022-2040)	73,756	30,761
В	Completions (2022-2023)	41,284	4,979
С	Remaining needs (2023-2040) (A-B)	32,472	25,782
D	Commitments at 31 st March 2023	7,731	41,313
E	Net needs 2023-2040 (C-D)	24,741	15,531 oversupply

3.29 This table provides an updated position, showing a reduction in the need for new industrial floorspace, and an over supply of new office floorspace. As a result, there continues to be no requirement to identify new land for office floorspace, but a need to identify opportunities for additional industrial development.

4. Employment supply

- 4.1 The Proposed Submission Plan sets out an economic strategy that continues to support the growth and intensification of the borough's Core Employment Areas, whilst providing some flexibility for complementary uses to come forward. Recent developments at Winnersh Triangle and the Thames Valley Science and Innovation Park have demonstrated how Core Employment Areas remain important locations for growth and are attractive locations to the market. In addition, biopharmaceuticals group Lonza have purchased a large vacant area at Thames Valley Park with the intention of relocating and expanding its biologics site. This signals further confidence in the local market, and that Core Employment Areas remain a fixture of the economic landscape of the borough.
- 4.2 There remain development opportunities at other Core Employment Areas. For example, Green Park now benefits from a new train station providing direct services to Reading and Basingstoke, with vacant land that could be brought forward for development.
- 4.3 In addition, at the University of Reading's Whiteknights Campus planning permission was recently granted for the relocation of the Headquarters of the European Centre for Medium Range Weather Forecasting, for over 10,000m² gross floorspace.
- 4.4 However, the intensification of existing Core Employment Areas is unlikely to be sufficient to meet the future employment needs identified in Table 6, particularly for industrial uses.

- 4.5 To support additional economic growth, the Proposed Submission Plan proposes the expansion of the Thames Valley Science and Innovation Park (TVSP) to deliver approximately 100,000m² of research and development floorspace, or equivalent trip generating activity within use classes E(g), B2 and B8. Of this, 95,000m² is anticipated to be in industrial use, and 5,000m² in office use.
- 4.6 Thames Valley Science and Innovation Park has recently experienced significant development interest, including the delivery of the British Museum Archaeological Research Collection which has recently been completed.
- 4.7 Other projects since the start of the plan period include the proposed development of:
 - Natural History Museum's Science and Digitisation Centre (approved May 2024) c. 25,000m²
 - Royal Botanical Gardens (Kew) herbarium, c. 16,000m²
 - Thames Valley Science and Innovation Park Gateway Building (approved August 2024), c. 5,000m²
- 4.8 The delivery of new employment floorspace at TVSP also supports the wider development strategy by forming part of the Loddon Valley Garden Village.
- The Proposed Submission Plan also proposes a modest 6,000m² extension to the Hogwood Industrial Estate Core Employment Area in Arborfield, which forms part of the wider Arborfield Green SDL.
 This additional industrial allocation is a reduction from that proposed in an earlier consultation version of the LPU to reflect the availability of land and a recent application submitted for the site.

Core Employment Area boundaries

- 4.10 As part of preparing the Proposed Submission Plan, the boundaries of existing Core Employment Areas were reviewed to take into account changes as a result of development and other changes. This builds on initial changes undertaken as part of preparing the Draft Local Plan (2020). These changes facilitate the expansion of Thames Valley Science and Innovation Park as part of the wider strategy.
- 4.11 The proposed changes are set out in Appendix 1. Maps of all the Core Employment Areas are included in Appendix H to the Local Plan Update document.

Other employment areas

- 4.12 Outside Core Employment Areas, smaller scale economic development will be supported in other locations as set out in subsequent policies. This includes the flexible and sustainable growth of small businesses in appropriate locations.
- 4.13 No other sites are specifically allocated for additional employment development. However, commitments and completions data has highlighted how land within defined settlements is increasingly being redeveloped for employment uses, and which is likely to continue to make a modest contribution to future supply.

Floorspace losses

4.14 A further factor in the need and supply balance of employment floorspace is the loss of employment floorspace due to proposed LPU allocations for alternative uses. Site references refer to Proposed Submission Plan Policies SS11 and SS14.

Table 7: Employment floorspace loss due to proposed allocation for alternative uses in the LPU

Ref	Site name	Industrial (m²)	Office (m²)
SS11	Arborfield Studios, Arborfield	34,492	0
SS14.7	Greenacres Farm, Nine Mile Ride, Finchampstead	Unknown	0
SS14.23	Winnersh Plant Hire, Reading Road, Winnersh	4,500	0
SS14.29	Station Industrial Estate, Oxford Road, Wokingham	2,300	0
SS14.30	Wokingham Borough Council offices, Shute End, Wokingham	0	8,500
	Total	41,292	8,500

Overall need and supply balance

4.15 The following table sets out the overall employment need and supply balance, when including the information from Tables 6 and 7.

Table 8: Need and supply balance.

		Industrial (m²)	Office (m²)
Α	Identified needs (2022-2040)	73,756	30,761
В	Completions (2022-2023)	41,284	4,979
С	Remaining needs (2023-2040) (A-B)	32,472	25,782
D	Commitments at 31st March 2023	7,731	41,313
E	Net needs 2023-2040 (Table 6)	24,741	15,531 oversupply
F	Land allocated for employment uses - Thames Valley Science and Innovation Park - Hogwood Extension	95,000 6,000	5,000
G	Gross Supply (D+F)	108,731	46,313

		Industrial (m ²)	Office (m²)
Н	Floorspace losses due to proposed allocation for alternative uses (Table 7)	41,292	8,500
I	Net Supply (G-H)	67,439	37,813
J	Need/Supply Balance (I-C)	+34,967	+12,031

- 4.16 The table shows that there is a surplus of both office and industrial floorspace, when considering the needs identified in the ELNS, in addition to completions, commitments, and the floorspace losses and gains associated with land proposed for allocation in the local plan.
- 4.17 For industrial land, this shows that when applying the plot ratio set out in the ELNS of 0.4, there is a surplus of 8.7 ha, above the identified need of 18 ha. This shows that for both office and industrial the local plan is meeting and exceeding the identified needs.
- 4.18 The above table does not make a specific allowance for additional floorspace likely to be delivered as part of the intensification and regeneration of existing employment sites, including Core Employment Areas.
- 4.19 It is however recognised that this does not meet the larger need identified in the ELNS of 53 ha of land for industrial uses. This figure is not however considered an appropriate for several reasons.
- 4.20 Firstly, the ELNS identifies that the delivery of strategic scale warehousing can only realistically be delivered through the provision of new land. The ELNS also highlights how the delivery of this type of use is beyond the scope of a single local planning authority and requires engagement with neighbouring local planning authorities to identify the most appropriate site options.
- 4.21 As part of the council's Duty to Cooperate engagement, the council wrote to all the Berkshire authorities in August 2023 seeking assistance in meeting identified needs, including identifying the figure of 53 ha of additional land across the Thames Valley. No local authority was able to assist and several noted that their own employment needs were not likely to be met as part of preparing their own local plans. Subsequently, in October 2023 all adjacent authorities outside Berkshire where employment had been identified as a potential cross boundary strategic matter, were contacted in writing to offer meetings to discuss this issue further. Again, no offers of assistance in meeting employment needs were received.
- 4.22 Secondly, very little land has been promoted for employment uses in the borough. The Housing and Economic Land Availability Assessment (HELAA) shows that of the 370 areas of land promoted for development, only 26 were promoted for employment uses, often as part of wider mixed-use schemes promoting residential uses. Of these, only one site was assessed as deliverable (Site for former M&S Building, Wokingham), and three sites were assessed as potentially developable. However, the potential employment capacity of the sites was largely not stated through site promotions, meaning the capacity of sites is unknown. This highlights the very limited opportunities to deliver additional employment land in the borough, over and above the proposals included in the local plan.

5. Summary and conclusion

- 5.1 This topic paper sets out further information regarding the council's approach to identifying employment needs in the Proposed Submission Plan and how those needs will be met over the plan period.
- 5.2 It shows that the needs for industrial and office floorspace can be met within the plan period through completions, commitments and the expansion of existing Core Employment Areas. In addition, employment floorspace will be delivered through the intensification and regeneration of Core Employment Areas, and appropriate employment uses outside Core Employment Areas within settlements. Economic development proposals in the countryside will only be supported where the criteria set out in the Proposed Submission Plan are met.

Appendix A: Core Employment Area boundaries

Core Employment Area	Boundary change proposed?
Green Park Business Park, Reading;	No.
Headley Road East Industrial Estate, Woodley	Yes.
	Eastern boundary amended to exclude residential gardens of recently completed housing on Gemini Road.
Hogwood Industrial Estate, Finchampstead	Yes.
Tinchampstead	Southern extent of the site reduced to reflect the alignment of the recently completed Nine Mile Ride extension.
Molly Millars Industrial Estate, Wokingham	No.
Ruscombe Business Park, Ruscombe;	No.
Suttons Industrial Estate, Earley;	No.
Thames Valley Business Park, Earley;	No.
Thames Valley Science and Innovation Park, Shinfield;	Yes.
	Extension to existing area to incorporate recent development at Shinfield Studios and the British Museum, and the additional economic development proposed as part of the TVSP and the wider Loddon Valley Garden Village.
Toutley Industrial Estate, Wokingham;	No.
	Eastern section removed due to extant outline planning permission for 130 residential units and a 70 bed care home (planning application reference: 211777).
Winnersh Triangle Business Park, Winnersh.	No.