



River Tyne North Bank Scoping Study

Final Report

November 2007



White Young Green

In association with

Storeys ssp Douglas Wheeler Associates

White Young Green Consulting Limited

Wallington House Old Brewery Court Starbeck Avenue Newcastle upon Tyne NE2 1RH

Report Status Final report

Date 21 November 2007 File No 33763rep070321v10

.....

Contents

1.	Intro	Introduction				
	1.1	Brief	3			
	1.2	Study Area	4			
	1.3	Final Report	4			
2.	Phys	Physical Review				
	2.1	General Overview	5			
	2.2	Context Analysis	6			
	2.3	Ownership	7			
	2.4	Landuse	7			
	2.5	Occupation	9			
	2.6	Character Assessment	10			
3.	Key I	Key Issues				
	3.1	Marine Sector Market Demand	11			
	3.2	Business Review Issues	11			
	3.3		12			
	3.4	Physical Issues	12			
4.	Reco	Recommendations for the Future				
	4.1	Rationale	16			
5.	The \	The Way Forward				
	5.1	Överview	18			
	5.2	The Assets	19			
	5.3	Marine Employment Development Opportunities	20			
	5.4	Other opportunities	21			
	5.5	Business Relocation	22			
	5.6	Linkages	22			
	5.7	Planning Framework	22			
6.	Next	Steps	23			
7 .	Appe	Appendices				
	Appe	Appendix 1 - Schedule of Consultees				
	Appe	Appendix 2 - Land Ownership, Land Use and Character Analysis Plans				
	Appe	Appendix 3 - Key Issues Plan				
		Appendix 4 - Tyne Tunnel Proposal				

Introduction

1.1 Brief

North Tyneside Council, Newcastle City Council and One NorthEast have commissioned White Young Green in association with Storeys ssp and Douglas Wheeler Associates to prepare a Scoping Study for the regeneration of the River Tyne North Bank as the first step towards a development framework for the area. The client brief specifically identifies the need to explore the potential for marine and non-marine employment led development along the River Tyne North Bank, covering the area from Smiths Dock on the east to Walker Riverside to the west.

The brief identifies that the outputs will comprise:

- Analysis of Existing Employment Sites and Businesses;
- Market Demand Analysis of Marine and Non-marine Employment;
- Recommendation for the future and the way forward;
- Demonstrating Strengthening Links between the Riverside and Major Centres of Population; and,
- The next steps.

1.2 Study Area



The River Tyne North Bank from Walker Riverside Industrial Park to Smiths Dock is a significant area of land, which, until recently was a major economic force for industrial and particularly maritime related employment but uncertainty now exists over the role the area should play. The study area is substantial and extends to 520 hectares and 9.9 kilometres of riverfront. In comparison terms, the riverfront is as long as the distance between Chelsea Bridge and Canary Wharf on the River Thames in London. The area has limited public riverfront access and has been developed over the years as a heavy industrial area, with a strong emphasis on marine related uses evidenced by the extensive wharfs, dry docks, large sheds and cranes servicing those uses.

1.3 Final Report

This is the Final Report that confirms the recommendation for the future, the way forward and sets out the next steps that should be taken to progress the regeneration strategy. This final report must be read in conjunction with the interim reports on the Analysis of Existing Employment Sites and Businesses and the separate interim report on the Market Demand Analysis of Marine and Non-marine Related Activities issued in February 2007.

These three reports are the outputs that comprise the Scoping Report.

2. Physical Review

2.1 General overview

River Tyne North Bank is part of a dense urban area including the communities of Walker, Wallsend, Howdon, Percy Main and North Shields. To the south of the river are the communities of South Shields, Jarrow and Hebburn and to the west is Newcastle City Centre.

The area has a complex economic profile with land on both sides of the river dominated by heavy industry contributing to the maritime activity of the area. However, the area is in a state of major change with pockets of strategic employment remaining alongside disused sites, derelict land, underutilised quaysides, major infrastructure, and other minority uses.

Within Walker Riverside Industrial Park the Study Area includes the three strategic employers of Duco, Wellstream and Shepherd Offshore.

The river runs north-south at this point and to the north of Walker Riverside is the disused Neptune Ship Yard and large areas of redundant dry docks associated with the former A & P Appledore Yard. At the transition between the A & P Appledore site and the Swan Hunter Wallsend Ship Yard the river bends sharply eastwards and the remaining scoping study area lies broadly along an east-west axis. Beyond the Swan Hunter Yard at Point Pleasant is a group of buildings in various uses and then the former AMEC oil rig fabrication site, which comprises a large area of underutilised waterfront land/buildings, which has recently been sold by AMEC.

At Willington Quay, a mixed use area of residential and smaller industrial uses is located to the north of Bewicke Street whilst to the south are a number of vacant sites and industrial uses, including some existing recycling activities. Immediately to the east is the Tyne Tunnel road interchange and tollgates and on the opposite side of the interchange is East Howdon Village, a small residential community squeezed between a major road and the adjacent NWL sewage works. Further along the River Tyne North Bank is the former ESSO site, which has recently been purchased by the Port of Tyne for logistics uses, the international ferry terminal and existing hardstanding areas used for storing car imports.

Former Port of Tyne land at Royal Quays, developed by Tyne and Wear Development Corporation during the 1980's and 1990's served by a new major road access from the A19, includes a factory outlet shopping area, the Albert Edward Marina and a mix of private and social residential development in an attractive landscaped setting. The final part of the study area is the former Smiths Dock and disused graving docks, where planning permission has been granted for a major residential development.

.....

Much of the study area is in a state of change. Large areas of land are currently unused, surplus to requirements or derelict. Other areas continue to have a strong industrial/employment focus while small pockets of residential communities are squeezed between industry and major infrastructure with resultant adverse impact on residents. The study area has been the focus of some previous initiatives and investment particularly through Tyne and Wear Development Corporation at Royal Quays and has been the target of some recent interest for residential development.

Many other riverfront locations in the UK have been or are in the process of regeneration. The strategy in many cases where no further demand for employment uses has been established has been concentrated on encouraging new uses to stimulate economic activity. The potential for other uses on the River Tyne North Bank will, however, depend on the extent of land identified through the Scoping Study as needed to continue to support marine led and other employment development.

This report therefore considers the future uses for the study area, based upon the results of the interim reports on the Analysis of Existing Employment Sites and Businesses and the Market Demand Analysis of Marine and Non-marine Related Activities issued in February 2007 that underpin this Final Report.



2.2 Context Analysis

The study area is formed from predominately marine and industrial related uses together with small residential communities and a concentration of more recent shopping, leisure, residential and the marina development towards the east at Royal Quays.

The context, character and linkages into the hinterland areas are outlined in detail in the earlier interim report.

The suitability of land for reuse and/or redevelopment is determined by regard to:

- Ownership. Is a site in single ownership or is land assembly required?
 What land is currently in public ownership?
- <u>Land Use</u>. What is the current or proposed use of a site, what are the current and future planning policies for the area and to what extent is planning policy compatible with adjoining uses, particularly existing residential communities?
- Occupation. How many businesses are currently in occupation? What size and type of premises do they occupy and what are their future intentions?
- <u>Character</u>. Quality of the area.

2.3 Ownership

Major land ownership is shown on three plans covering the west, central and eastern parts of the study area included in Appendix 2. Within that part of the study area located in Newcastle, the City Council owns the freehold of the majority of the land. As a result ownership and occupier information at Walker Riverside is readily available and comprehensive in its coverage.

By comparison, within North Tyneside, land ownership is more widespread, and the Council's landholding is less comprehensive with the major employment sites in the main, privately owned although recently the Port of Tyne, which has trust status, has acquired some significant sites. Nevertheless, in overall terms for such a large area the number of landowners is relatively small and reflects the significant landholdings of some landowners.

2.4 Land Use

Land uses are classified into four broad categories, which are identified by different colours on the set of three plans, which can be found in appendix 2 at the end of this report:

- Employment (i.e. industrial and offices) purple
- Retail & leisure blue
- Other commercial red

Residential – brown

The plans distinguish between vacant sites, which are shown as solid colour, and occupied sites, which are hatched. Sites where the use is unknown or outside these categories have not been coloured. This includes areas of open space and roadways, but also land that has no clearly definable use. The largest of these is a former tip owned by North Tyneside Council, which adjoins the A19 at Howdon.

Within the western part of the study area the land is predominantly in employment use. There is a small block of housing at Fisher Street, Walker and some retail / leisure uses at Station Road, Wallsend. The largest swathe of vacant employment land within the Study Area comprises the Neptune and adjoining Wallsend yards, which spans the boundary between Newcastle and North Tyneside.

Within the central part of the study area the riverbank comprises contiguous employment uses. To the north, along both sides of Hadrian Road there is a scattering of other employment and commercial uses, which do not generally relate to the riverside marine uses. At Willington Quay the riverside employment strip narrows and housing predominates to the north of Hadrian Road, although a large pocket of employment land/premises, some of which are currently disused, lies to the eastern side of Howdon Lane.

Within the eastern part of the study area riverside employment is dominated by The Port of Tyne's estate and Northumbrian Water's Howdon Sewage Treatment Works. Within this area Chemson and Simon Storage also have facilities. To the east of the Port of Tyne land at Royal Quays is a mixed employment and commercial area, comprising offices, Twining's warehouse, the factory outlet shopping centre, and various commercial leisure uses including Wet & Wild, ten-pin bowling and the JJB fitness centre. There is a small community of existing housing at East Howdon Village, and a larger area of modern private and social housing at Royal Quays though the Study area boundary excludes much of the latter. This adjoins proposed new housing for sale at Smiths Dock, leaving the Dock Road/Lawson Street Industrial Area as an island of employment uses surrounded by residential communities.

Whilst the vacant major employment sites provide the primary opportunities for new investment within the study area, the above analysis highlights other areas that could also be suitable subject to further detailed study. These soft sites include:

- Land around White Street and Station Road, Walker,
- Land to the east of Swan Hunter's Wallsend Yard including Davy Bank,
- Amec's Wallsend Yard

- Land at Potter Street and Stephenson Street
- Swales Industrial Area, Howdon Green Industrial Estate and the former Howdon tip
- Dock Road/Lawson Street Industrial Area, North Shields

Some of these areas will be suited to a renewal of the building stock and a continuation of the current use. Others may be suitable for a change of use, subject to the proposed development framework for the area and the Local Development Framework process.

2.5 Occupation

Though the large vacant and underused riverside sites are a prominent feature of the Study Area and have provided the impetus for this study, there is a wide variety of businesses accommodated in premises of varying size, age and condition throughout the area.

A detailed listing of commercial premises within the Study Area is set out at Appendix 2. This has been derived from the Rating List produced by the Valuation Office Agency, but supplemented by our own research to incorporate buildings not yet entered on the list. (Buildings within the Enterprise Zone at Royal Quays have only recently become rateable, and at the time of our Study had not been entered.)

Within the Study Area there are 462 commercial hereditaments, and around 370,000 sq m (4 million sq ft) of commercial floorspace¹. Generally the larger premises are down by the riverside, whilst the hinterland comprises small and mid-sized units.

At the southern end of the Western Study Area, Walker Riverside Industrial Park comprises modern units with a mix of unit sizes, ranging from Wellstream's bespoke factory to small starter units at Nelson Road. Between the Industrial Park and Fisher Street the building stock is predominantly old and in poor condition, though there has been some redevelopment of buildings to the east of White Street, and the Walker Industrial Estate comprises more modern units. Along the western side of Fisher Street there are modern units at the corner of Walker Road but further north the age and condition of the stock is poorer.

At the western end of the Central Study Area, the St Gobain works is a complex of buildings of varied age and condition. To either side are industrial estates providing small terraced units of reasonable condition. At the corner of Station Road, Wallsend are modern premises including Segedunum Museum, retail warehouses and an office block. These overlook the vacant Swan Hunter Yard. At Davy Bank the buildings are mainly old and in poor condition and incorporate

¹ Hereditaments described as storage land, car parks etc. are excluded.

vacant areas, though amongst them is the more modern Ceres House. Despite their age and condition the relative scarcity of heavy engineering workshops with good eaves heights and craneage has ensured continued demand for larger buildings here. Between Hadrian Road and the metro line are further large units, some of which have been subdivided and occupancy rates are good.

Buildings at Amec's Wallsend Yard include major fabrication sheds in reasonable condition. To the north are modern buildings in a mix of uses. Point Pleasant Industrial Estate provides small units most of which are modern and in reasonable condition, but the amongst these are old poor quality units. At Willington Quay the majority of the stock is old and of poor quality. Some demolition and refurbishment is occurring at Morston Quays. At Swales Industrial Estate the building stock is also old and of poor quality. Howdon Green has more modern, terraced units, but is vacant.

In the Eastern Study Area much of the employment land is used for open storage, (e.g. the Volkswagen Distribution centre at Port of Tyne) or for industries that require few buildings (e.g. the Sewage Treatment Works and Simons' bulk liquid and gas storage facility. Chemson occupy large old factory premises in the middle of this area, and the Port has a few transit sheds beside its passenger terminal. The mixed-use area to the north of the Port's land comprises new buildings in good condition. Bullring and Smiths Docks have been cleared of buildings. The Lawson Street industrial area comprises mainly small units the majority of which are in poor condition.

2.6 Character Assessment

The plans identified below highlight the main characteristics of the study area and are located in Appendix 2.

Visual Quality – indicates the three broad classifications of good, average and poor quality based on the general condition and character of the sites.

Character Areas – illustrates an appraisal in terms of the main character areas that are created by a combination of uses, quality, topography and access.

Key Features – identifies the key visual features and strategic views into and out of the area.

Marine Infrastructure – identified by the extent of wharfs, cranes, berths and dry docks along the banks of the River Tyne visible from both sides.

3. Key Issues

The interim reports on the Analysis of Existing Employment Sites and Businesses and the Market Demand Analysis of Marine and Non-marine Related Activities issued in February 2007 identify a number of issues that need to be addressed in the regeneration of the area. The main issue is that the recent cessation of work and/or closures of the remaining major sites in marine related use, including the Swan Hunter, AMEC Point Pleasant and the A&P Tyne Neptune Yards, is perceived by many people as the end of large scale marine employment on the North Bank of the Tyne.

The market demand analysis undertaken as part of this scoping study has demonstrated that there are potential opportunities for attracting marine related employment. However, it is evident that the marine market is also changing, with one pattern of employment being replaced with another and the challenge for the public sector is therefore to manage the process of change, ensure that the continued supply of adequate sites is provided for and guide the growth of the new marine technologies.

The key issues related to market demand, business review, skills and physical context are outlined below with the physical issues also illustrated on the Key Issues Plan in Appendix 3.

3.1 Marine Sector Market Demand

- <u>Significant growth</u> in the specific sectors of Subsea Technology, Marine Fabrication, Marine Repair/Conversion /and Offshore Decommissioning markets, which could enhance existing marine related businesses and offer significant opportunities for new business investment.
- World Leading in the North East there are at least eleven 'world leading' subsea companies and a number are poised for further growth. A requirement for significant additional manufacturing/warehouse floorspace and yard space with quayside access has been identified and ONE NE are currently negotiating on 2/3 significant fabricators and other inward investment enquiries.
- <u>Port of Tyne</u> expanding operations on both sides of the river to service higher levels of port activity, particularly in relation to logistics.

3.2 Business Review Issues

 <u>Land Availability</u> - some marine related businesses are currently constrained by the lack of availability of suitable land for expansion, riverside infrastructure and skills.

 <u>Land Speculation</u> - a number of land owners perceive an opportunity to add value to their assets by considering development of their land for residential and other higher value uses.

 <u>Vacant Land</u> - some areas of land have become underutilised due to changing uses and economic factors. The recent cessation of active work at the Swan Hunter Yard and consolidation of A&P Tyne onto their site on the South Bank of the river, together with the significant area of underused former AMEC land has created a large swathe of vacant/underutilised land along the River Tyne North Bank. However, existing marine infrastructure, including berths, deep water access, buildings, external hardstanding areas, etc - remains part of the overall land asset, which could support other maritime industrial users.

3.3 Skills Development and Retention

- The attraction of inward investors and the opportunities for growth of indigenous companies requires initiatives to ensure the availability and retention of a range of appropriate engineering, craft, technical and design skills.
- Some of the companies within the sub-sea sector already have a close liaison with the Higher Education Institution's (HEI's) for both recruitment and research and development. This needs to be strengthened and further developed.
- The brief for the development framework for the study area should contain provision for the clustering of a people development, research and development facility in the high value engineering sectors. Collaboration with Skills North East the regional skills partnership, HEI's, Further Education (FE's), Learning and Skills Council (LSC), and Aspire (CBI and NECC) will assist in the development of a more co-ordinated strategy than the current fragmented approach by individual companies to skill retention and development.

3.4 Physical Issues

- Riverfront there has long been limited public access to the 9km riverfront of the North Bank as it has been used for heavy industrial and marine related employment for many years.
- Image parts of the area have a poor image that does not make it attractive for new investment.
- Land Use Conflicts parts of the area away from the riverfront have already changed use, including some new residential development currently taking place close to remaining industrial uses. However, the potential conflict between mixed uses could be significant, due either to

the effect that new industrial uses may have on adjacent residential areas or the concern of existing business regarding the proximity of new noise sensitive development, particularly housing, and the effect it may consequently have on their business operations. The local planning authority will need to ensure safeguarding the interests of both the existing residential and industrial occupiers in relation to individual planning applications and in the emerging Local Development Framework and Area Action Plans.

- Un-neighbourly Uses a number of scrap/recycling businesses are located within the Scoping Study area that have a negative impact on the physical environment because their activities have not been properly planned. Growth of these activities has taken place near to residential areas, existing environmental assets such as Willington Gut and/or other sensitive areas (including the River Tyne itself), and are consequently visually intrusive. Concerns have also been raised by nearby residents over noise, dust and other issues.
- Tyne Tunnel construction work will soon begin on a second Tyne
 Tunnel, which will supplement the existing river crossing by 2012 and
 significantly improve north/south access across the river. A plan showing
 the proposed rerouting of traffic is included in Appendix 4. In particular, it is
 essential that the new tunnel infrastructure and operations contribute
 towards the rejuvenated economic activity of the river corridor area and
 does not constrain it
- Wallsend Town Centre is in need of revitalisation and invigoration. A retail study has been commissioned by the Council to identify the existing retail floor space, retail offer and current demand. Although not within the study area, the health of the town centre has in the past been closely linked to the level of economic activity in the riverside employment areas. The cycle of closures over recent years culminating in the recent cessation of major active work at the Swan Hunter Yard has therefore had an adverse impact upon the town centre. Rejuvenated economic activity along the river corridor would undoubtedly provide a significant boost for town centre businesses and opportunities must therefore be explored to ensure that the regeneration of the town centre is closely linked with the rejuvention of the river corridor
- Cultural Heritage the World Heritage site of Hadrian's Wall and the location of Segedunum Roman Fort within the study area are two very important historical and cultural assets. The Segedunum museum is an already well used visitor and educational resource and attracts a wide range of visitors into the area. The redevelopment of sites, particularly in the vicinity of Segedunum, may provide opportunities for further archaeological excavations.

 Key Views – changes in level across the scoping study area as the land rises away from the river edge provide a number of key vantage points and views across the river to the River Tyne South Bank. Key views have been identified in areas where it is important to maintain the visual connection with the south bank and also maintain the open environment around Willington Gut.

- Landmarks the skyline has long been dominated by cranes, a clear sign of the existing and past industrial activity although this has changed in recent years with the removal of many of these iconic structures. The sheer scale of the cranes enables glimpses of them to be caught from miles away. As true landmarks they visually orientate people to the area and the River Tyne. However, the recent cessation of active work at Swan Hunter has been followed by the sale of six of these historic landmarks and some other key site infrastructure.
- Landscape there are a number of key landscape assets within the area. The Hadrian walk and cycle route, which is part of the national cycleway network stretches over half of the area, providing a green link and good access for pedestrians and cyclists within and through the area. Willington Gut, a large tidal inlet into the Wallsend Burn used as a small marina, bisects the scoping study area and provides a link between the river and a large area of green open space stretching along Willington Dene. However, overall the proportion of green space within the study area is limited compared to the amount of previously developed land, with no green space at all along the waterfront. However, the natural level changes between the river frontage and the hinterland to the rear enable some separation of heavy industry, mainly located alongside the riverfront from the smaller scale industrial and some residential uses, which are generally located on the higher ground to the rear.
- Planning Policy the existing statutory development plans are in the process of being replaced by the preparation of Local Development Frameworks by North Tyneside and Newcastle City Councils. As part of this process, the Area Action Plan for Walker Riverside has been formally adopted by Newcastle City Council and will help drive and control development within the study area lying within the City Council's boundary. An Area Action Plan for Wallsend Town Centre and the adjacent riverside is currently being prepared by North Tyneside Council and will link closely with the work currently being undertaken in the River Tyne North Bank study area and the Walker Area Action Plan.

An important issue for the new statutory development plans will be to effectively link the regeneration plans for Walker Riverside and Wallsend Town Centre into the regeneration of the River Tyne North Bank, to enable a joined up approach to be taken by the agencies working in the area and provide a clear investment framework.

- Marine Infrastructure in the form of berths, deep water access, cranes, docks and hard standing still serves much of the riverfront land, although some is in poor condition. Nevertheless, the River Tyne has been identified in the recent technical report prepared by Parsons Brinkerhoff on behalf of ONE NE as an important asset in the country in terms of its river infrastructure. The retention of this infrastructure will help to maintain and attract marine led employment. The loss of the existing cranes from the Swan Hunter yard is not, however, an impediment to its re-use for marine uses.
- Access the existing road infrastructure provides good access throughout the study area and beyond with Hadrian Road suitable for use by large vehicles of all types. The Metro line runs along the northern boundary of the site, providing a frequent service throughout Tyneside. Other public transport services offer more restrictive routes, which miss many of the main employment sites but integrate with the Metro at Wallsend Town Centre. However, the Metro line embankment and the major roads are also barriers to the easy integration between the riverside and the adjacent communities. Continued good road access will be essential to promoting growth in economic activity along the River Tyne North Bank.
- Areas of Change four main areas have been identified as the focus for economic regeneration on the River Tyne North Bank. They are sites that are currently vacant, underutilised or with the potential to accommodate new employment uses.

4. Recommendation for the Future

4.1 Rationale

There are undoubtedly alternative development options for the future use of existing employment sites in the River Tyne North Bank area. However, it is the role of North Tyneside and Newcastle City Council's and ONE NE to ensure that the adequate provision of employment sites is maintained to strengthen the economic prosperity of the area. This can only be achieved by ensuring that the right sites are available for businesses looking to invest.

In this respect, defence and marine have been identified as one of the North East's 'key manufacturing sectors' and one of the nine priority sectors in the 2006-2011 Regional Economic Strategy 'Leading the Way'. Employment in this sector remains strong at around 6,000, with significant potential growth areas.

The Analysis of Existing Employment Sites and Businesses and the Market Demand Analysis of Marine and Non-marine Related Activities issued in February 2007, that underpin the conclusions of this Final Report, have confirmed the continued strategic regional importance of the existing marine infrastructure located on the River Tyne North Bank, in particular sites with appropriate infrastructure including large sheds, hardstandings and quayside areas capable of accepting heavy loads and with deepwater access. This is also confirmed in the earlier technical report prepared by Parsons Brinkerhoff.

The international pre-eminence of eleven subsea companies already located in the North East has also been highlighted, as well as the immediate requirement for significant additional industrial floor space and additional yard space, with appropriate quayside access, from local companies who are looking to expand and current significant inward investment enquiries for large sites with quayside access that One NorthEast are currently negotiating.

Riverfront land with good marine and other infrastructure is essential to the continued expansion of the new marine related technology markets. This land is clearly a scarce resource by its geographical nature and cannot be replaced by designation elsewhere. The optimum sites must therefore be safeguarded for these specialised marine related uses and not allocated for other uses which can easily be located elsewhere.

The partners will need to establish how much of the riverside land should be safeguarded solely for marine use. This can be a cyclical industry subject to rapid changes in global demand and the likelihood of attracting investment of sufficient scale to warrant safeguarding all riverfront land together with the long term sustainability of likely investment should be tested further as part of the next stages of work.

Sites not retained for marine use would be retained for other employment uses. Should the partners embark on a marketing campaign focussed on securing major investment, an agreed timeframe needs to be established. Long-term inactivity may be unacceptable to both Councils and to major private landowners.

There is also recognition that marine led employment development on its own will not provide a sustainable employment future without training, education and other supporting employment uses that are essential to service the growing marine led employment markets, as well as the wider economy. In this context the area has the potential to accommodate North Tyneside Council's ambitions for a new Higher Education initiative for the Borough, bringing regeneration benefits not only to the riverside but also to Wallsend Town Centre.

There are differing views amongst the other stakeholders to the amount of marine related employment land that should be retained and protected. A number of landowners and developers, who believe that the marine related employment development sector is no longer a viable option for them, consider that new, higher value uses should be brought to the area.

The conclusion of this Scoping Study Final Report is that the immediate priority is to undertake further work to help establish actual demand and the likelihood of major investment on the Tyne. This will inform policies on safeguarding the most appropriate sites for future marine related employment development and can be seen as an essential preliminary stage to establishing a robust Development Framework for the area. It is also essential that further work be undertaken to identify how selected areas for other employment uses, training and education development can be identified nearby that can support the growing marine markets and the employment needs of the adjacent communities.

The following section therefore sets out how the Scoping Study area can continue to support the key areas of growth identified in relation to marine led employment development.

5. THE WAY FORWARD

5.1 Overview

There is a real opportunity to promote a 'Marine Industries Cluster/Centre' on the River Tyne North Bank to build on the European pre-eminence in subsea, fabrication, marine design and naval architecture.

The 'Marine Industries Cluster/Centre' could become a leading European integrated marine industrial estate with deepwater facilities, multi–user load out and fabrication facilities and high-wide load access. The complex would aim eventually to establish Global credentials for subsea manufacturing, fabrication, conversion and assembly of offshore oil and gas modules and infrastructure.

The River Tyne North Bank strategy will, however, require a clear and effective delivery mechanism to be established identifying the key public and private sector roles, which will provide a clear framework for future development and deliver the significant investment required in the following:

- Promoting and facilitating marine sector led employment development;
- Supporting new training, education and other business development near to Wallsend Town Centre to take advantage of excellent public transport links and help rejuvenate the town centre;
- The strengthening of the riverside communities in Walker, Wallsend, East Howdon and North Shields;
- Supporting the development of appropriate existing business, including relocations and suitable expansion land where appropriate; and,
- Supporting the Port of Tyne growth objectives

An aim for the public sector partners (NTC, NCC & One NE) is to take a lead role so as to deliver additional growth and employment opportunities by addressing the needs of existing specialist businesses, and encouraging the clustering of new businesses servicing the marine, offshore and defence industries. There is a significant opportunity to support and encourage the specialist clusters of marine led employment, while recognising that the large scale shipbuilding sector is unlikely to return to the area.

Further work should be undertaken to establish actual demand and the likelihood of major investment on the Tyne. This will inform the future overall direction of this initiative including the focus and scope if any marketing activity.

The significant marine infrastructure along the River Tyne North Bank should be dedicated to these growth sectors and inappropriate riverfront uses encouraged to relocate elsewhere.

River	Tyne	North	Bank
Rege	nerati	on Str	ategy

At the same time there is a need to revitalise the area for the benefit of the adjacent communities, providing a new future and removing industrial blight and providing opportunities for employment in the expanding marine led employment development and other associated uses.

The Key Factors relevant to deliver the recommendation for the future are:

- The Assets The land, business, marine infrastructure, people and heritage of the area;
- Marine Employment Development Opportunities and the area of vacant land that should be retained for marine related employment development to achieve the public purpose of regeneration;
- Other Opportunities including the preferred location for other land uses supporting marine led employment;
- Business Relocation The potential for business relocation and expansion to improve outputs; and,
- Linkages into the adjacent communities.

5.2 The Assets

The key assets of the River Tyne North Bank are the people, businesses, riverfront land and the marine infrastructure that have worked together to create a successful marine employment area. The traditional shipbuilding industries may have moved to other parts of the world, but the area is already the base for a number of world leading companies in the expanding marine Subsea Technologies sector. The traditional ship building skills have been supplemented with higher value skills in the design and manufacturing of products for the subsea sector. The Port of Tyne is another successful maritime business and is already increasing turnover with plans to extend operations, particularly logistics on the River Tyne North Bank and to bring back into service the Tyne Commission Quay for visiting cruise ships.

Marine related employment development requires riverfront infrastructure of docks, cranes, berths and hard standing to service the businesses. The River Tyne North Bank has a good range of existing riverfront infrastructure, but for effective development of the three identified growth sectors of; Subsea Technologies, marine repair/conversion/fabrication and decommissioning and/or recycling; the existing marine infrastructure needs to be retained as far as possible to service the businesses in these sectors.

Whilst this study has identified the general extent of infrastructure, a more detailed technical study is required to quantify the asset base and the potential

it has to continue to service the expanding marine sector. This is particularly relevant, as the owners of some existing riverfront sites have been selling or removing cranes and equipment in the belief that marine related employment is no longer viable and the land should be developed for other uses.

A number of riverfront sites are currently unused including Neptune Yard, A&P Tyne site, Swan Hunter Yard and part of the AMEC site. The Neptune Yard, A&P site and Swan Hunter are contiguous with good access to the adjacent main road and Metro networks and the AMEC site is also well located. Some riverfront sites have uses, which are not related to marine activity and these uses should/could be relocated to non-riverfront locations if additional riverfront land is required.

5.3 Marine Employment Development Opportunities

Growth opportunities in marine related employment development have been identified in relation to:

- Subsea Technologies;
- Marine repair/conversion/fabrication & recycling;
- Decommissioning offshore facilities (not ships); on shore reception & demolition
- Port of Tyne.

However, the market requires the right sites to attract new investors, generally large level sites with good loading capacity and berths with deep-water access. Specialist marine fabrication companies may also require industrial buildings of up to 100,000 sq ft with wide full height doors.

The four main components of the 'Marine Industries Cluster/Centre' are:

Subsea Technology Precinct

The existing Subsea cluster of businesses including Duco, Wellstream and Shepherd Offshore are located in the Walker Riverside Industrial Park. This is immediately adjacent to the vacant Neptune Yard and the A&P Tyne sites, which could provide the land and specialist infrastructure to attract new Subsea companies and also provide important expansion space to existing companies. The area could therefore be actively marketed by One NorthEast and Newcastle City Council and other relevant agencies as a Subsea Technology Precinct.

Marine Fabrication Precinct

The Swan Hunter Yard is presently vacant and the AMEC Point Pleasant site is also partly vacant but currently houses the Engineering Business and is being