

City of Bradford
Metropolitan District
Council

**Bradford Employment
Land Review**

Final Report

ARUP

City of Bradford
Metropolitan District
Council

**Bradford Employment
Land Review**

Final Report

July 2010

Ove Arup & Partners Ltd
Admiral House, Rose Wharf,
78 East Street, Leeds LS9 8EE
Tel +44 (0)113 2428498 Fax +44 (0)113 2428573
www.arup.com

This report takes into account the particular instructions and requirements of our client.

It is not intended for and should not be relied upon by any third party and no responsibility is undertaken to any third party

Job number 123986-00

Job title	Bradford Employment Land Review	Job number	123986-00
-----------	---------------------------------	------------	-----------

Document title	Final Report	File reference	
----------------	--------------	----------------	--

Document ref

Revision	Date	Filename	Final Report 21.12.07.doc		
Final Issue	21/12/07	Description			
			Prepared by	Checked by	Approved by
		Name	Sarah Layton	Nicole Roche	Tom Bridges
		Signature			
Revised Issue	12/07/10	Filename	Final report 12 07 10		
		Description	With client comments		
			Prepared by	Checked by	Approved by
		Name	Fiona Boden	Tom Bridges	Tom Bridges
		Signature			
Revised issue	27/09/10	Filename	Final report 27 09 10		
		Description	With client comments		
			Prepared by	Checked by	Approved by
		Name	Fiona Boden, Tom Bridges	Tom Bridges	Tom Bridges
		Signature			
		Filename			
		Description			
			Prepared by	Checked by	Approved by
		Name			
		Signature			

Issue Document Verification with Document

Contents

	Page	
1	Introduction	3
	1.1 The Project	3
	1.2 Structure of the Report	3
2	Bradford District Profile	5
	2.1 Bradford District in Context	5
	2.2 Population	6
	2.3 Role of Settlements in Bradford District	6
	2.4 Links Beyond Bradford District	7
	2.5 Summary	8
3	Existing Economic and Business Profile	9
	3.1 Introduction	9
	3.2 Employment and Economic Activity	9
	3.3 Employment Structure	10
	3.4 Entrepreneurship and Business Start-ups	11
	3.5 Summary	12
4	Bradford District Property Market	13
	4.1 Introduction	13
	4.2 Information and terminology used	13
	4.3 Bradford's Office Market	13
	4.4 Bradford's Industrial Market	16
	4.5 Issues this raises for the District in the process of change	19
	4.6 Summary	21
5	Current Employment Land Supply in Bradford District	22
	5.1 Introduction	22
	5.2 Current Supply	22
	5.3 Deliverability Issues of Employment Sites	24
	5.4 Summary	27
6	Future Economic and Spatial Change in Bradford	29
	6.1 Introduction	29
	6.2 Status of Regional and Local Planning Policy	29
	6.3 Economic Policy Aspirations	29
	6.4 Emerging Spatial Strategy	32
	6.5 Regeneration Proposals	33
	6.6 Summary	35
7	Projected Demand for Employment Land	36
	7.1 Introduction to Modelling	36

7.2	Review of Different Methods	36
7.3	Applying Local Assumptions to REM	44
7.4	Selecting the Employment Land Demand Scenario for Bradford District	45
7.5	Summary	46
8	Future Strategy To Meet Projected Employment Land Demand	48
8.1	Introduction	48
8.2	Analysis of Demand and Supply	48
8.3	Use of Potential Retention and Potential Reserve Supply To Meet Residual Demand from the unconstrained growth scenario	52
8.4	Summary of Analysis of Supply and Demand	52
8.5	Settlement Strategy	53
8.6	Settlement Strategy Summary	58
9	A Route To Achieving Change In Bradford District	60
9.1	Introduction	60
9.2	Recommended approach for the LDF	60
9.3	Implications for the District's Regeneration Schemes	61

Appendices

Appendix A

Office and Industrial Market Analysis

Appendix B

Analysis of Employment Land Supply

Appendix C

Methodology For The Quantitative Analysis Of The REM

Appendix D

Site Assessment Method

1 Introduction

1.1 The Project

Bradford Metropolitan District Council commissioned Arup and DTZ to undertake an Employment Land Review to inform the evidence base for the Bradford Local Development Framework. In particular the report will be used to inform the development of policy in the Core Strategy DPD and the identification of employment land in the Allocations DPD. It will also inform wider policy development and regeneration initiatives.

This study takes into consideration Bradford districts role within the Yorkshire and Humber Region and the Leeds City Region. This enables the review to understand the nature of Bradford's economic change and which employment sectors are likely to support future economic growth. It also enables the study to understand the wider context for Bradford's economy and future economic profile.

An Employment Land Review seeks to understand how potential future employment patterns will impact on the demand for and supply of employment land. It seeks to provide the evidence for the Local Planning Authority to manage their employment land portfolio through policies and allocations in the Local Development Documents that comprise the Local Development Framework. The review also informs LDF strategic interventions in order to bring forward sites for short term supply.

The method used in this review aligns with the 2004 ODPM methodology for undertaking Employment Land Reviews. It seeks to understand the quality of the existing employment land portfolio and future employment land demands. The assessment is informed by an understanding of the District's characteristics and assets, its role in the wider city region and is underpinned by market realism.

1.2 Structure of the Report

This report is structured into three Parts:

Part One – The Current Situation

The first part sets the context for Bradford and the district's economy. It details the districts characteristics, outlines the role of settlements within the district and provides details on Bradford's economic and market profile. This section also sets the scene for employment land supply by detailing the amount and profile of the current supply based on analysis of Replacement UDP allocations.

Part Two – Future Change

The second part seeks to understand how Bradford's economy is changing and what this means for growth in employment and projected demand for land. This section firstly establishes the policy context for the district and highlights how Bradford is planning to achieve transformational change. It then analyses future demand for employment land by modelling a number of scenarios based on historic trends, floorspace analysis and forecast jobs growth.

Part Three – Forward Strategies

The third part brings together the analysis in Parts One and Two to provide a locational commentary of the adequacy of the current employment land supply to meet the likely future demand. This part of the report sets out locational strategy across the district to provide an employment land supply that meets future demand and can deliver Bradford's regeneration proposals. It concludes by providing a set of recommendations on how the LDF may manage these issues.

City of Bradford
Metropolitan District
Council

**Bradford Employment
Land Review**

Final Report

**PART ONE: CURRENT
SITUATION**

December 2007

2 Bradford District Profile

2.1 Bradford District in Context

2.1.1 Location

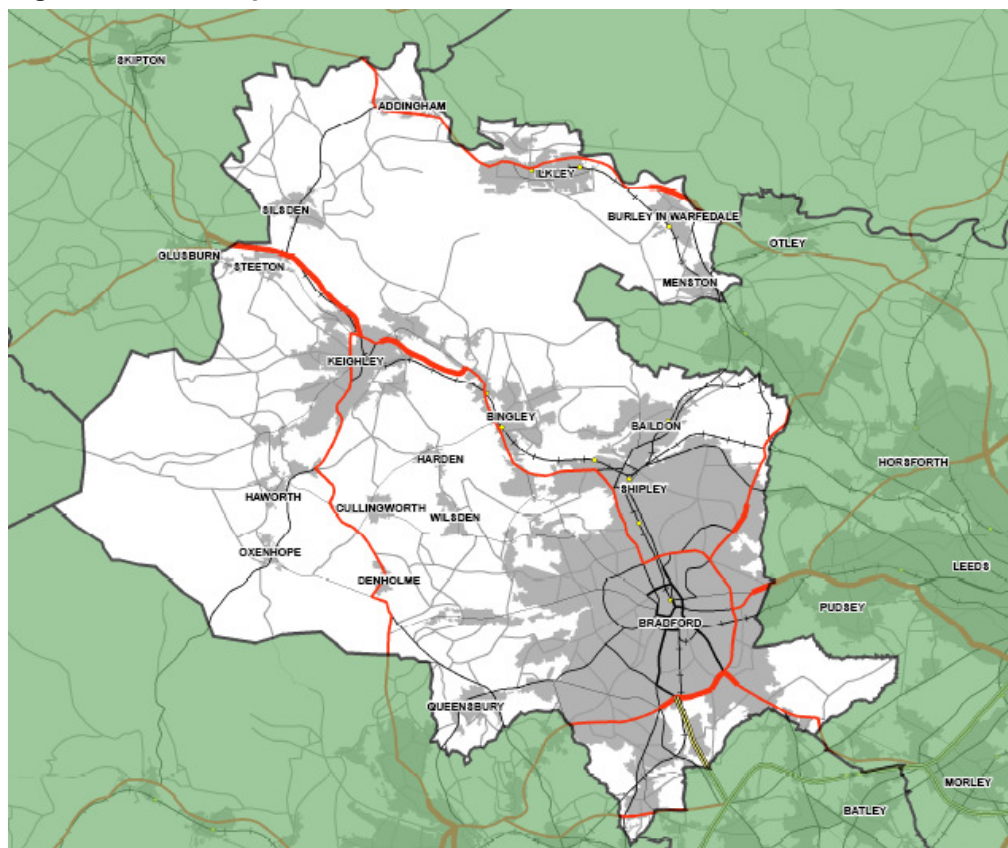
Bradford district is located in West Yorkshire and is bounded by Leeds District to the east, Craven District to the northwest, and Calderdale and Kirklees to the south. The western boundary of the district forms part of the West Yorkshire and Lancashire county boundary.

The district has a distinct urban rural split. The southern part of the district is predominantly urban with the highest urban density located in the south east of the district around the city of Bradford and its surrounding settlements. North of the A650 the district is mainly rural and comprises of small towns and villages such as Silsden, Addingham, Ilkley and Burley in Wharfedale.

Bradford has good communication links via the M606 which accesses the major transport routes from North to South (M1) and from West to East (M62). The north of the district, along the Airedale corridor also has good links to the North West via the A650 and M65. Plus the district is served by Leeds-Bradford International Airport (located 7 miles from Bradford city centre) and has good rail links.

The rural parts of the district comprise the Wharfedale in the north, Airedale which runs southeast - northwest along the A650 and the Pennine uplands in the south. The two important tourist centres in the district are located in Haworth (in the southwest) and Saltaire (on the northern boundary of Bradford's urban area).

Figure 2.1 Map of Bradford District



Source Arup GIS

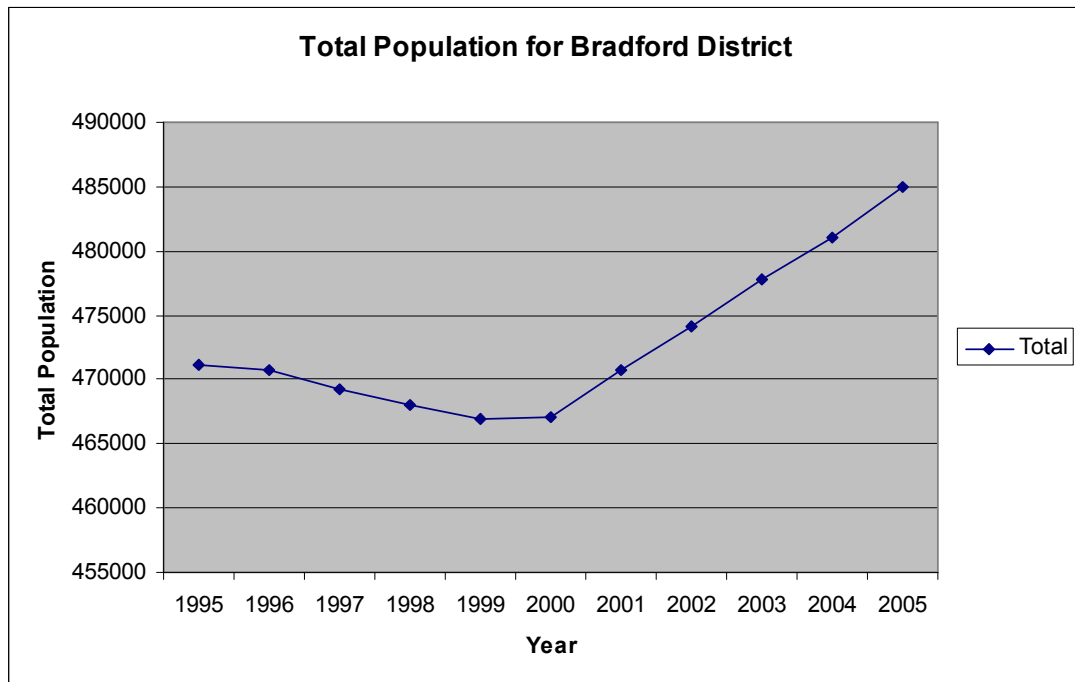
Bradford district forms the second largest conurbation in the West Yorkshire sub region. The population of the district is around half a million people. Its close proximity to Leeds, Halifax and Huddersfield means the district has access to a large labour supply with several million people living within a one hour commuting distance. It also has the third largest economy in the region.

2.2 Population

Bradford has the fastest growing working-age population of any major city in the UK. Bradford accounts for 22% of the resident working age population in West Yorkshire (ONS 2001).

Figure 2.2 shows the past trend in population growth in Bradford district, with an annual increase of 4,000 people. This demonstrates the rate of growth and emphasises the opportunities available to the district from a growing localised workforce.

Figure 2.2 Population Growth in Bradford District



Source *Nomis (2006) ONS historic & mid year population estimates*

Despite the opportunities provided by a growing working age population, Bradford district has the lowest proportion of its 16 – 24 year old population economically active compared with other authorities in West Yorkshire (Yorkshire Futures 2005). This is combined with poor graduate retention rates. Therefore, there are concerns over recruitment difficulties in the labour market. Whilst the district has a rising population, there is still a shortage in skills needed by local employers.

2.3 Role of Settlements in Bradford District

2.3.1 Bradford

The city of Bradford is the main location for employment and housing in the district, and includes the district's major employers. Bradford urban area comprises of the parliamentary constituencies of Bradford North, Bradford South and Bradford West. The main employment locations are:

City Centre – this is the main location of office uses which are dispersed over the city centre, in addition to the retail and cultural centre. There are also clusters of general industrial uses on the periphery of the city centre in the northwest and southern parts of the city.

M606 Corridor – the Low Moor area in the Bradford South constituency is a major employment area and is characterised by office, manufacturing and storage or distribution uses. The corridor is the location of the popular Euroway business park.

Bradford South – this area is also the location for several of Bradford's major employers including head offices for financial and business services.

Bradford North – the Canal Road Corridor is located in this constituency. This area is characterised by retail and light industrial uses. There are popular clusters of industrial and manufacturing uses located around Bowling Back Lane. This is also the location of the districts major employers including head offices for retailers.

Bradford West – this area is characterised by more dispersed industrial areas located around Thornton.

2.3.2 Shipley

Shipley is located in Airedale and has access to good facilities. The town has a strong employment base due its origins as a textile and manufacturing centre. It also serves as a commuter settlement for Bradford and Leeds. Expansion of the town is constrained by its location in the valley and the surrounding topography. The main employment locations are situated to the east of the town and along the canal corridor. Shipley is also the location for the northern part of the Canal Road Corridor regeneration scheme. Transport congestion, reducing severance and unlocking development opportunities in the Shipley and Canal Road area are currently being investigated though the Airedale Integrated Transport Strategy. This included road improvements and a package of public transport improvements in the Shipley area and a new train station at Manningham.

2.3.3 Bingley

Bingley is located in Airedale and has access to good facilities. It has a strong employment base and is also used as a commuter settlement for Bradford and Leeds. The main employment areas are located along the A650 corridor; this is also the location of Bradford and Bingley's head office.

2.3.4 Keighley

Keighley is the second largest settlement in the district. The town's topography means there is limited capacity for future expansion; however there has been infrastructure investment in the town's road and rail networks. The town is a main retail and service centre serving the surrounding rural hinterlands. The main employment areas are located along the A650 corridor and Dalton Lane. Older industrial uses are located to the south of the town. The M56 is an important strategic route connecting Keighley to East Lancashire and the North West and for this reason Keighley has historically been home to several haulage companies.

2.3.5 Steeton & Silsden

These settlements in the Airedale have retained a local industrial base, mainly due to their good road and rail links to Skipton, Bradford and Keighley. These settlements also form important commuter and service centres.

2.3.6 Addingham

Addingham is a semi rural village. Its purpose is now predominantly as a residential base serving Wharfedale and Airedale, and as a commuter settlement.

2.3.7 Ilkley

Ilkley is the largest town in Wharfedale and has developed from being a spa town into a residential and tourist centre. It has become a popular commuter town for Bradford and Leeds and forms part of the 'golden triangle' which extends to Harrogate and Leeds.

2.3.8 Burley in Wharfedale & Menston

These settlements are located in Wharfedale to the north of Bradford. They are popular commuter settlements with good rail links to Bradford and Leeds centres.

2.4 Links Beyond Bradford District

Bradford district is a key location within the Leeds City Region and serves as a regional city. The district also has good links to the North West and Manchester City Region. There is a strong economic synergy between Bradford and Leeds. Of all the district's neighbouring

Leeds, only Bradford has a reciprocal two way travel to work relationship, with similar numbers of commuters travelling between the two districts.

The Leeds Bradford Corridor Study (July 2007) highlights the advantages and opportunities for economic growth available to both cities due to their close proximity. The corridor is well placed to serve local markets and continue growth in specialist food and drink, and manufacturing sectors. The Corridor Study also identifies the opportunities offered by localised SME growth and entrepreneurship.

Bradford district also has important links with Craven district as Airedale runs northwest through Bradford district up to Skipton. The Airedale Corridor is the focus of regeneration which will bring advantages to both districts. Craven is also dependent on the labour market catchment within Bradford district to meet the needs of Skipton Building Society.

The district can also take advantage of its close proximity to Leeds-Bradford airport and the economic opportunities this brings. Part of the site assessment criteria used to appraise the employment land portfolio includes the proximity of Leeds-Bradford airport as an indicator to assess the marketability of sites.

2.5 Summary

Bradford district has a range of assets and opportunities, which can form a firm basis for economic growth across the district. Existing assets include the districts role within the city region and its relationship with Leeds. The district also has a growing working age population which presents an opportunity for a localised workforce to take advantage of employment in the districts growth sectors.

The city of Bradford plays an important role in the region as a Sub Regional Centre. It has a strong existing economic base particularly in the North and South parliamentary constituencies around the M606 and Canal Road corridors. The other main settlements in the district with a good industrial base and potential for growth are Shipley, Bingley and Keighley along the Airedale Corridor, as well as towns in Wharfedale.

The district also has important links with areas beyond its administrative boundaries. This includes the employment area extending along the M606 corridor south into Calderdale, the growing number of small businesses located to the east of the district along the Leeds – Bradford corridor, and the popular business parks along the A650 corridor northwest towards Skipton.

3 Existing Economic and Business Profile

3.1 Introduction

This section sets out an overview of the current economic situation in Bradford district. It assesses the districts employment and unemployment rates compared to the regional average. It profiles the largest employers in the district and seeks to understand which industrial sectors are performing well and likely to continue growing. This section also looks at the health of the districts economy from the perspective of business start-ups and new business registrations.

3.2 Employment and Economic Activity

Table 3.1 summarises economic activity in Bradford district. It shows the districts level of economic activity is still behind the regional average as demonstrated by 4% lower economically active population and the 1% higher unemployment rates compared to the regional average. The percentage of working age population of ethnic origin that are unemployed is also 7% higher than the regional average. The ratio of Bradford's workforce in full time and part time employment is 2:1 which reflects regional averages¹.

Table 3.1 Comparison of Economic Activity in Bradford District and Yorkshire and Humber

Economic Activity	Bradford District	Yorkshire and Humber
Economically active (as a percentage of the total economically active population)	74%	78%
Model based unemployed (as a percentage of the total economically active population)	6.3%	5.5%
Percentage working age population unemployed and of ethnic origin	17.5%	10.8%

Source *NOMIS (April 2006 – March 2007)*

According to the Economic Strategy for Bradford (2007) the district has a higher than average number of people in low-skilled employment. This is demonstrated by salary figures which show that gross weekly pay in the district is 6% less than the regional average. Bradford also has the lowest proportion of economically active 16 – 24 year olds compared with other authorities in West Yorkshire (Bradford Indepth 2005).

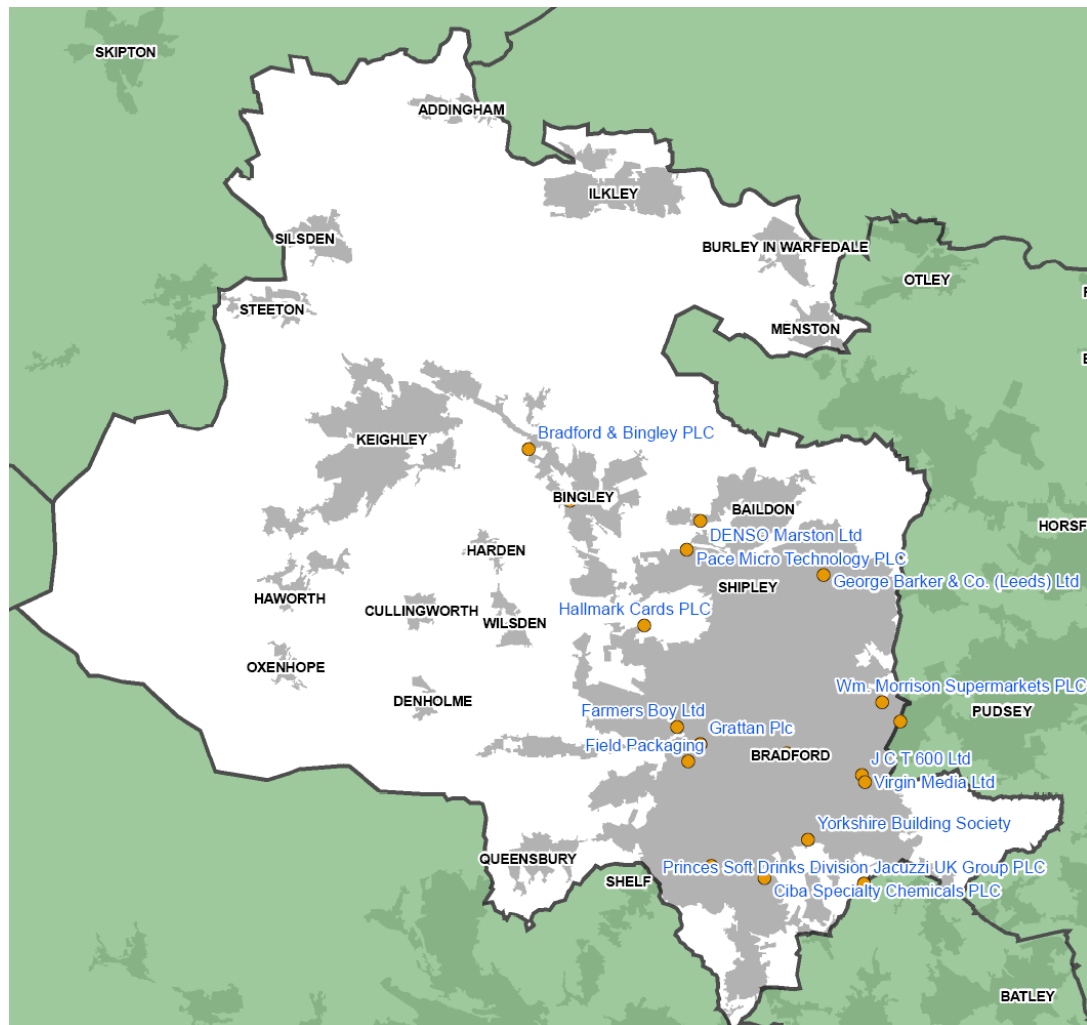
The analysis of economic activity across the district shows that while Bradford is performing relatively well in terms of percentage of its workforce employed and in full time employment, the district is starting from a relatively low base compared to the regional average. The analysis shows that while Bradford's population is forecast to grow it faces challenges of unemployment and a low skilled resident workforce compared to other districts in the region.

¹ Nomis 2005

3.3 Employment Structure

Bradford district has a diverse and varied employment base including retailers, major utilities, financial and business services and manufacturing. The main employers in the district include Wm Morrison Supermarkets Plc, Yorkshire Building Society and Hallmark Cards Plc. Three of the UK’s largest financial institutions headquarters are also located in Bradford; these are Yorkshire Building Society, Bradford & Bingley Building Society, and Provident Financial.

Figure 3.1 Location of Top 20 Employers in Bradford District



Source Arup GIS

Figure 3.1 shows the location of the top 20 employers in Bradford district as classified by number of employees. The map shows the absence of a consolidated central business district, however it does show that Bradford urban area is an important location for the district’s major employers.

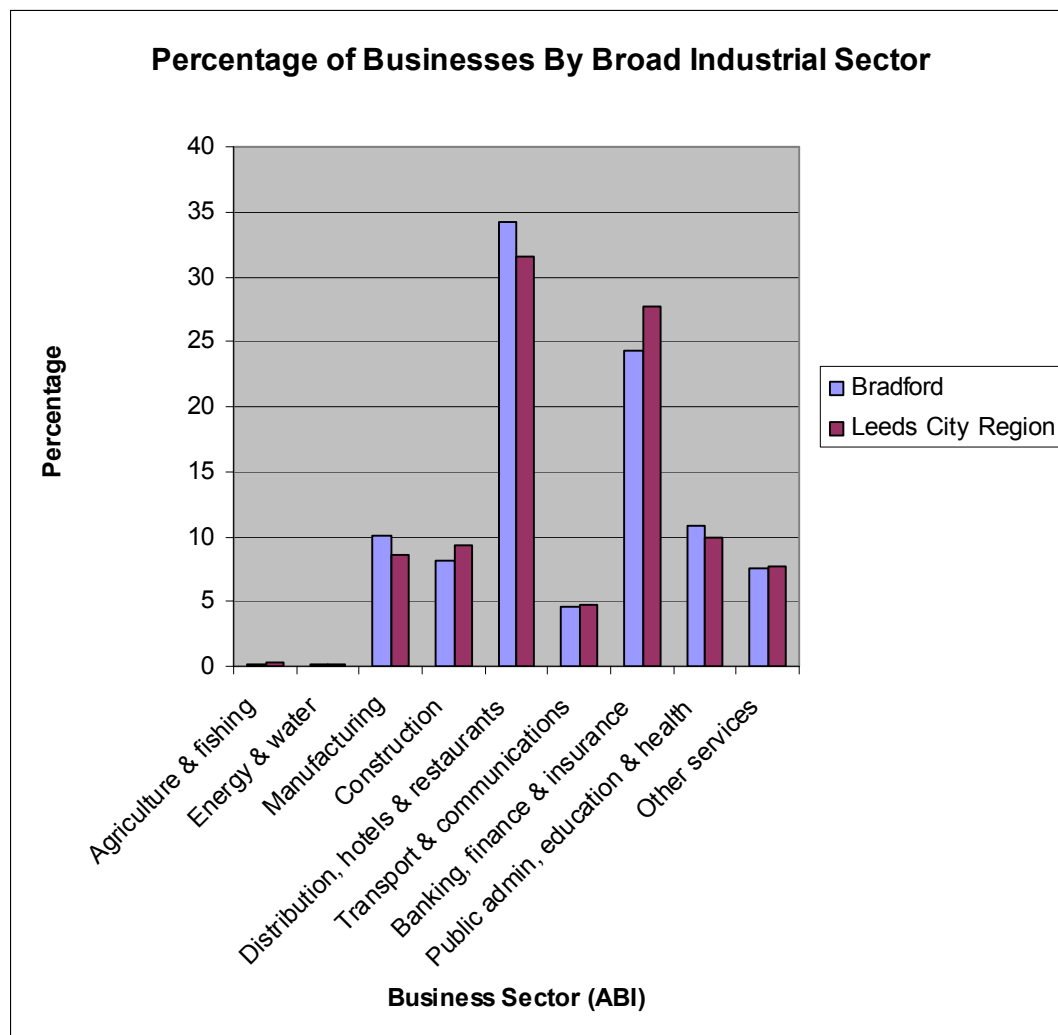
Annual Business Inquiry (ABI 2005) data shows recent growth in the districts workforce employed in healthcare and environmental technologies. This is offset by a decline in numbers employed in the advanced engineering and metals cluster. These results show that with the exception of advanced engineering, employment is growing in the priority clusters identified in the Regional Economic Strategy (RES).

Figure 3.2 shows the comparison between Bradford and the Leeds City Region as a whole in terms of proportion of employment in particular sectors. It shows Bradford district has a higher percentage of businesses in distribution, hotel and restaurants; manufacturing; and public administration, education and health services compared to Leeds City Region.

Banking, finance and insurance also comprises a significant percentage of Bradford's businesses.

The graph is useful to show Bradford's current economic role within Leeds City Region. It demonstrates the district is an important location for financial and business services. However, the district also plays an important role in supporting the city region's manufacturing and distribution sectors.

Figure 3.2 Comparison of Businesses in Bradford District and Leeds City Region as Classified by Broad Industrial Sector



Source ABI (2005)

3.4 Entrepreneurship and Business Start-ups

VAT registrations and de-registrations are the best official guide to the pattern of business start-ups and closures. They are an indicator of the level of entrepreneurship and of the health of the business population. As such they are used widely in regional and local economic planning².

The VAT registrations for Bradford district in 2005 were 11% of the end of year registered business stock compared to the Yorkshire and Humber average of 8.1%. This shows a higher level of new start-ups compared to the rest of the region. De-registrations were just above the regional average of 8% of total registered business stock.

² These figures do not, however, give the complete picture of start-up and closure activity in the economy. Some VAT exempt sectors and businesses operating below the threshold for VAT registration are not covered. At the start of 2005, the VAT threshold was an annual turnover of £58,000.

These figures show strong growth in small and medium sized enterprises (SMEs). This has been particularly apparent along the Bradford – Leeds corridor where there has been growth across a range of sectors including construction, manufacturing and service activities³. There has also been growth in specialist, wholesale and warehousing companies suggesting potential for small scale logistics activities to grow. Therefore there is potential in the district for small scale, lower value office activity in business and insurance services along the Bradford – Leeds corridor and small scale logistics and specialist sectors in the district's principle towns; linked to higher value city centre functions.

3.5 Summary

Bradford is starting from a lower base compared the rest of the region. It has a lower employment rate compared to the regional average and the district has higher rates of unemployment, with 16 – 24 year olds facing particular difficulties. The district suffers from a low wage low skill economy, with average earnings lower than regional averages. This is one of the challenges the district will have to address in order to achieve economic growth. The skills issue is addressed in Section 6.

Bradford has a range of large and small businesses that are continuing to perform well. The analysis shows the district's largest employers originate from a diverse sectoral base ranging from financial and business services, retail, food and drink, and chemicals. The largest employers are located within the Bradford urban area, although there is a noticeable absence from the central business district. There is strong growth in SME's and business start-ups compared to regional averages and there appears to be opportunities for continued growth. This puts Bradford in a good position to remain competitive within West Yorkshire and the wider region.

³ Leeds-Bradford Corridor Report (2007)

4 Bradford District Property Market

4.1 Introduction

An understanding of the market provides important context to the employment land review. It provides an additional layer of evidence to inform decisions about where there may be a need to make additional employment land available, manage a reduction of land in some locations and give a steer about what type of development may be appropriate to meet occupier's needs, now and in the future.

This section provides a locational overview of the office and industrial (which includes warehousing) property markets in Bradford District. It includes a review of the supply and range of existing premises, their rental value and potential occupier interest. It also comments on take up of premises over recent years and what is coming forward in terms of pipeline supply.

This section is written from a market led perspective and should be considered and balanced with the full content of this report.

A more detailed office and industrial market analysis is located at Appendix A

4.2 Information and terminology used

This section makes use of PROMIS data. PROMIS Reports are provided by Property Market Analysis LLP an independent property research company to which DTZ subscribe. This information is supplemented by the interpretation and professional opinion of DTZ Surveyors.

It should be noted that in property market terms, commentary about supply relates to stock or premises that is constructed and is either occupied or available for occupation. This is different from a planning policy interpretation of supply, which relates to land which is available for development.

It should also be noted that PROMIS makes reference to premises located in town and city centres and out of town and city centres, often drawing comparisons. This is a market definition which varies from place to place and for clarity does not correlate with planning policy definitions of in and out of centre, often demarked on proposals maps accompanying local plans and unitary development plans.

The detailed market analysis in Appendix A provides data in terms of both square metres and square footage.

4.3 Bradford's Office Market

4.3.1 Bradford City Centre

Bradford's office market is occupied by a variety of businesses with a wide range of needs. At present, office stock is largely secondary, in many cases refurbished, which does not meet the needs of the modern office occupier. What little high specification stock that is built, such as No.1 The Interchange, is usually occupied quickly. It is possible that local business will be more likely to occupy existing stock since they have little choice in the geographical area in which they must operate. However, if Bradford is to compete for office occupiers on a regional and national scale then it will need high quality office space with which to meet their needs.

Achievable headline rents for high specification office units are in the region of £15 per square foot based on the two recent lettings at No.1 The Interchange. Current asking prices for the remaining space at No.1 The Interchange are £164 per m² (£15.25 per sq.ft.). This was achieved May 2005 when space was let to The Consulting Consortium and we see no reason why that figure could not be repeated in either this or another similar high quality development. Indeed we see the market going beyond this figure if a degree of critical mass

is delivered. As new accommodation is delivered and the market begins to mature, the potential to re-base rentals to £172 per m² (£16 per sq.ft.) and above will be realistic.

As can be seen from the recent office lettings, there is not a definitive quantity of office space that satisfies potential occupier's desire. As such, flexible floor space which could meet a range of occupational needs would be desirable.

It is the professional opinion of DTZ that grade A accommodation is delivered in the city centre, it will let. This is supported by Knight Frank's market deliver report for Bradford City Centre. Developer interest is around large scale schemes such as those proposed at the Business Forest.

4.3.2 Shipley, Saltaire and Baildon

Occupational activity in the Shipley / Saltaire area is relatively weak, particularly for large office suites. Accommodation can remain on the market for some time, for example the Chandlers Wharf development has been on the market for approximately 4 years.

The locality tends to take its market and value cues from Bradford, where rents have struggled to exceed £161.50 per sq.m (£15 per sq.ft) for grade 'A' space. However, the area forms one of the major regeneration successes in the region and Shipley has attracted occupiers such as Halliday Clark Architects, Robinson Design Group, Filtronic Plc and HMRC (formerly the Inland Revenue).

The office market in Shipley has historically focused on converted mill properties and upper floor premises in the town centre, however new developments have been constructed which have focused on more high quality accommodation, especially on the edge of the town.

The Airedale Masterplan identifies that several office schemes are proposed in the Shipley area. The Advanced Digital Institute (ADI) is a commercially-led design and development project supported by the major digital industries within the Shipley area and Yorkshire Forward. It is intended to be a national digital research resource. It is proposed that the ADI is situated on the canal front adjacent to the Shipley Interchange in order to be as accessible to the wider region as possible, however a decision on location remains to be concluded. Focussing the Shipley market at the Advanced Digital Institute will ensure a clear and definable role for the market going forward.

A new college development for Shipley College will also provide new courses linking into the neighbouring creative arts, digital industries, horticulture and health care businesses. An accommodation strategy has been produced and the College are currently undertaking a site feasibility study.

The proposed development of Shipley Eastern Link Road will potentially reduce traffic in the town centre and ensure that the transition between the existing employment offer and the town centre is greatly enhanced. Another factor here is that the Shipley town centre offer is very poor and outmoded. Redevelopment in the future will contribute to an overall improvement in image to potential occupiers making Shipley a more attractive office location.

4.3.3 Bingley and Cross Flats

Bingley is home to Bradford and Bingley Building Society HQ and as such attracts a number of spin-off businesses to the area. Much of Bingley's supply of office premises is located on purpose built business parks and sites outside of the town centre.

The rent at which this purpose built premises is let is highlighted in the table below.

Table 4.1 Typical office rental values in Bingley and Cross Flatts

Location	Office Rents (note these premises are marketed or let in region of the figures quoted)
Russel Court	£86 per sq.m or £8 per sq. ft
Victoria Mews, Cottingley Business Park	£86 per sq.m or £8 per sq. ft
Fairfax House	£86 per sq.m or £8 per sq. ft
Aire Valley Park	£172 per sq.m or £16 per sq.ft
Weir House	£100 per sq.m or £9.30 per sq ft

Source DTZ

With a lack of large, deliverable sites identified within Bingley town centre itself, the Coolgardie and Bingley Auction Market sites essentially form one large development site (close to Crossflatts Railway station) which could ultimately deliver a significant quantity of office development strategically located along the A629 corridor with good rail access, and would align with the aspirations of the Airedale Masterplan.

4.3.4 Keighley

There is an extremely limited provision of office accommodation in Keighley which is perhaps surprising given that the town historically had a significant manufacturing and distribution base. Given the size of this market one would expect there to be a more significant provision of office accommodation for supporting financial and business service functions.

Office accommodation is currently being marketed at Universal Mills, on the fringe of the town centre available to let on short flexible terms at competitive rents equating to £86 per sq.m (£8 psf). Self contained office accommodation is available to let on Devonshire Street on the edge of Keighley town centre close to the Airedale Shopping Centre, at a level which equates to circa £75 per sq.m (£7 psf). Surrounding occupiers are mainly professional services such as accountancy or insurance firms.

Other accommodation in the town centre is on the market at rents in the region of £5 psf or on an all inclusive basis and would be suitable for professional occupiers or those seeking all inclusive rents.

However, the majority of existing office accommodation available in the town consists of poor quality space located above retail premises or in converted, often obsolete, mill buildings. At present, we consider that developer demand is low for constructing offices in Keighley (particularly speculatively) as the likely low rental values achievable would render development unviable.

4.3.5 Ilkley

Although it is in an attractive setting and is a significant rural centre, there is limited accommodation currently available in the centre of Ilkley, especially a shortage of accommodation with large floorplates. This is in part due to competition for the provision of competing higher value uses. The majority of accommodation is available in converted terraced properties or at first floor level (space above retail shop units). Much of this accommodation is poor in quality and unlikely to be attractive to the wider market.

Occupiers are mostly limited to professional services in the centre of the town with larger occupiers being historically attracted to nearby larger settlements of Bradford, Skipton, Keighley or Shipley. Local business start ups therefore have a relatively poor choice of space in the town and attracting small businesses from outside of the town is subsequently difficult.

Because of the lack of maturity in the office market, prevailing rental values are considered to be low and currently would make development of new offices unviable. Developers are unlikely to build any quantum of offices speculatively (or otherwise) in the town without funding or without also providing other uses (ie. residential) to cross-subsidise the build costs as part of a mixed use scheme.

4.4 Bradford's Industrial Market

4.4.1 Introduction

This section provides an overview of Bradford's industrial and warehousing market, focussing on the key locations and settlements.

4.4.2 Bradford Urban Area

Very little of Bradford's industrial and warehousing stock is considered to be new build (built in the past 5 years) and in addition in 2006 there was no reported new space completed.

Current availability of premises was estimated to be 256,000 m² by the end of 2006 (Bradford District Council), compared to a peak of 343,650 m² as at end of 1993. Availability is currently 5% of total stock compared to a North & Scotland average of 7.1%. The number of vacant premises has remained relatively constant over the last year whereas nationally the number of vacancies grew by around 3.7% on average.

Around a quarter of all demand has been for units of 2,323 – 4,646 sq.m (25,000 to 50,000 sq.ft). There is also a significant amount of industrial development in the pipeline (with planning permission or proposed).

Top rents in Bradford for industrial space were reported to be £54 per m² (£5.00 per sq.ft.) at the end of 2006 and have remained relatively stable over the last year although rents in the North & Scotland have risen by approximately 1%. Historically industrial premises have been slightly cheaper on average than the rest of the North & Scotland and considerably cheaper than the national average. This is illustrated in the table below.

Table 4.2 Prime Industrial Rents (£ per sq.ft.)

Year	Bradford	North & Scotland Average	PROMIS Centres average (sq.ft.)
2000	£4.50	£4.98	£6.38
2001	£4.50	£5.02	£6.47
2002	£4.50	£5.03	£6.51
2003	£4.50	£4.98	£6.46
2004	£4.50	£4.95	£6.42
2005	£5.00	£5.13	£6.54
2006	£5.00	£5.18	£6.61

Source PROMIS

Bradford Urban Area needs to focus on delivering high quality industrial sites in the best locations.

The M606 corridor provides the greatest opportunity to provide accommodation that will meet the needs of the modern industrial and logistics market. In addition, these areas should seek to capitalise on the proximity to the M62.

On the western side of the city the existing allocations, save for those which allow for the expansion of existing occupiers, are largely redundant in terms of ability to deliver modern occupational accommodation.

Bowling Back Lane offers an opportunity to contain heavy industrial and traditional manufacturing uses in one area, specifically the area bounded by Sticker Lane, Wakefield Road and the Bradford-Leeds Railway Line.

4.4.3 Shipley

Industrial accommodation in Shipley is focused around a select number of business parks and Industrial Estates as well as smaller older units in and around the town.

Rental values range from around £45 per sq.m. (£4.25 per sq.ft) for newer premises to £43 per sq.m. (£4 per sq.ft.) for more traditional industrial premises.

The development of the Shipley Eastern Link Road may unlock development potential. The Dockfields Area currently contains a diverse mix of printing, plastics, engineering and digital firms. With this in mind, the intention is to build on these successful businesses by reintroducing research, development and business incubator facilities to Shipley. As part of the reopening of the waterfront of the Leeds Bradford Canal, the Dockfield Road area would be part of a mixed use waterfront development, creating a business park around **Carnaud Metal Box**. This would enable essential business relocations within Shipley and encourage inward investment.

Although we consider that current demand for industrial premises in Shipley is reasonably good, the level of future demand for industrial premises may be linked to the success of the Digital cluster (depending on the future success of the proposed Advanced Digital Institute) and the spin out requirements for light assembly and high value added manufacturing uses. It is difficult to see however, how such uses could be differentiated to the proposed use / occupier profile for Bingley Technology Park. Depending upon the success of the ADI, we would recommend that the Council is flexible in its approach to granting planning consents at the park so as not to preclude other types of uses, should such demand come forward.

Should the Shipley Eastern Link Road proceed, it is recommended that a masterplan of the Dockfield Road area be drawn up to identify key development opportunities in this part of the town as a result of the road scheme.

4.4.4 Bingley

Industrial premises in the centre of Bingley town centre are mainly focused around converted mill buildings and small stone built workshop premises. In addition to this, a number of small business / industrial parks are dispersed around the fringe of the town, with newly developed estates situated slightly further a field such as Castlefields Industrial Estate. Single storey warehouse units are currently available within the estate and are being marketed at £43 per sq.m (£4 psf).

Castlefields Industrial Estate is the only significant site at present, which has recently gone through a major overhaul with the re-provision of a number of units to a modern specification. Once these new units have been taken up and the remaining land fully developed out the only location in Bingley capable of delivering any quantum of accommodation is the Coolgardie Farm site.

Situated on the frontage of the old A650 and bounded by the railway to the north, this site located on the western edge of Bingley, we see this as the key location for future development.

The aspiration to deliver a Technology Park is realistic however we would not want to see all of the available land here restricted to specific sector's as this may impact the expansion of other indigenous companies in the town.

4.4.5 Keighley

Demand for industrial premises is strong with many high tech manufacturing and precision engineering businesses relocating to newly developed premises in the Keighley area. The area has a multitude of industrial accommodation from light industrial units to high quality warehouse / distribution premises.

There are many other small clusters of industrial properties throughout the town centre and fringe as well as a number of light industrial estates offering single storey units.

Demand for small-to-medium units is particularly strong (units from around to 232 to 929 sq.m. or 2,500 to 10,000 sq.ft.) whilst there is also a good level of demand for slightly larger units (above 929 sq.m. or 10,000 sq.ft.). From our discussions with local agents it has been stated anecdotally that industrial take up in the town could be around 55,750 sq.m. (600,000 sq.ft.) per annum.

Rents vary widely according to location and specification of industrial premises (as demonstrated in table 4.3 below) and a wide variety of accommodation is currently available on the market. Many of the units available are suited to a wide variety of occupiers and there is much scope for the expansion of business, the introduction of new businesses or business relocations within the Keighley area.

Table 4.3 Typical industrial rental values in Keighley

Location	Industrial / Warehousing Rents (note these premises are marketed or let in region of the figures quoted)	Type of Space
Ebor Mills	£18 per sq. m / £1.69 per sq.ft	Traditional mill warehouse
Lawholme Lane Industrial Estate	£30.89 - £37.20 per sq.m / £2.87 to £3.45 per sq.ft	Workshop unit
Worthside Works	£22.45 per sq. m / £2.18 per sq.ft.	Workshop
Gingerbread Mill	£19.095 per sq. m / £1.77 per sq.ft.	Large modern warehouse
Airedale Business Park	£32.29 per sq. m / £3 per sq.ft	Flexibly sized warehouse units
Marley Industrial Estate	£58 per sq. m / £5 per sq.ft	Smaller workshop in modern industrial estate
Knowle Spring Industrial Estate	£73.3 per sq. m / £6.81 per sq.ft	General industrial space

Source DTZ

This said, demand in the town is predominantly for freehold premises – the Trafalgar Park scheme at Lawholme Lane for instance currently has nine out of the ten of the units under offer on a freehold rather than a leasehold basis. Freehold values are approximately £1,000 per sq.m. (£95 per sq.ft.) for units up to around 929 sq.m. (10,000 sq.ft.) and around £800 per sq.m. (£75 per sq.ft.) for larger units sizes. Development land in Keighley is likely to achieve up to around £1.25M per hectare (£500,000 per acre).

Industrial land in Keighley has developed sporadically and primarily around the bespoke requirements of specific occupiers over a substantial time horizon. There is evidence of some new build development in the town which has been relatively successful; however Keighley has a substantial amount of poor, second hand stock which is located throughout the town and which is now vacant and in disrepair and or struggling to let well having been refurbished to a low quality standard. It appears that there is simply too much second hand stock on the market and not enough modern accommodation. If new accommodation were to be delivered, it is likely to be successful, particularly if targeted towards the freehold market.

4.4.6 Ilkley

Ilkley has a limited market for industrial development with most existing provision catering for indigenous local demand. Whilst there will be a requirement for further land in the future,

this should be restricted to the remaining allocations. The recycling of existing sites as they come to the end of their useful economic life will therefore, become increasingly important over time. This puts a greater emphasis on the need to defend such sites from pressure from developers to deliver higher values uses.

4.5 Issues this raises for the District in the process of change

4.5.1 Introduction

Bradford is a City poised for transformational change. The scale of intervention proposed will have a significant impact on the future role of the City Centre and change its position in the sub-region across all market sectors.

Such changes also will alter the future role of the wider district. We see this as positive and one where the wider district can take on a supporting / complimentary role focussed on certain locations at specific sectors as the market grows and matures. This position however, provides a challenge to setting out a robust portfolio of sites for the next 15 to 20 years.

Bradford's industrial heritage whilst offering up some great opportunities also provides limitations and a restriction on the ability of Bradford to perform and meet the needs of modern occupiers.

Several key issues are presented which this employment land review must face head on to ensure that a balanced, deliverable and practicable portfolio is realised. These include:

- There is an over supply of poor quality second-hand stock both office and industrial. Many of the fantastic mill buildings are now functionally obsolete and or incapable of economically viable conversion for example.
- The spatial distribution of current allocations is a reflection of past industrial trends rather than one reflecting the needs of modern occupiers.
- There is currently no central business district. The office market is sporadic in terms of take up, fragmented spatially and too reliant on pre-lets due to low levels of prevailing rents.
- There is inadequate provision of large industrial sites in the right location to meet emerging demand in both B2 and in particular B8 uses.

4.5.2 City Centre

The City Centre needs to develop a 'Grade A' office market. This will only be successful if the provision of office space in the City Centre moves from the current position of sporadic peripheral ad hoc developments to the delivery of a central business district.

A solution to this issue can be realised through the delivery of the Business Forest Phase I. Forming part of the Park at the Heart, the opportunity to provide a first phase of a new central business district framed within world class public realm will make a quantum shift in the perception of Bradford as an office location. The proposed relocation of the Magistrates Court to Exchange Court is required to facilitate this development. Exchange Court will also provide office accommodation but not such a substantial quantum. It is likely to be of significant interest to the legal profession however, and will establish a new "legal quarter"

Between these two locations is the main transport interchange. It is hoped that once the market matures and rental levels increase, that the redevelopment of the interchange to provide office, hotel, residential and supporting station related retail may be realised. It is anticipated that a substantial amount of office accommodation could be delivered here along with a greatly enhanced public transport gateway to the city. It is anticipated that these developments could deliver in the region of 1 million sq ft of accommodation.

Forster Square station is also recognised as a development opportunity where new office accommodation could be delivered, adjacent to the Inland Revenues' (HMRC) existing

building, and the Channel Urban Village also includes an element of future office provision, as does the Odeon scheme.

4.5.3 Bradford Urban Area

It is considered that the M606 corridor should be the primary focus for the delivery of high class industrial units, and in particular logistics. Its direct accessibility and very close proximity to the M62 is extremely attractive to the market and the recent announcements by Marks and Spencer to locate their 3,000,000 sq.ft distribution unit on the proposed West Bowling Golf Course site is testament to this.

Bowling Back Lane to the south east of the City Centre is a clear and definable location for heavy / traditional industrial and manufacturing uses.

To the west of Bradford, in the outlying suburbs, there are currently a significant number of sites available. These areas are relatively poor in terms of access and topography and we do not see a compelling reason to retain a significant number of these sites in the future.

This is an area where considerable amounts of land can be released for development of other more profitable uses. This will address the continual problem of having dispersed industrial and office development in between areas of housing in the outlying suburban areas.

It is only by facing up to these issues however that Bradford will perform as 21st Century city and grow both the office and industrial markets in the future.

4.5.4 Airedale

The settlements of Shipley, Bingley and Keighley in the Airedale Corridor provide a great opportunity to deliver accommodation focussed at specific sectors especially digital and creative industries and the opportunity to provide more affordable accommodation for small to medium sized enterprises and growing businesses in an attractive and relatively rural setting.

Shipley is a clear candidate for the delivery of the Advanced Digital Institute (ADI) and this will provide a distinct role for the Shipley market going forward. The industrial market is not so clear. It is difficult to see any scope for development in Shipley without the provision of a bypass which may unlock certain sites.

In Bingley however, the proposed Technology Park provides a significant, large site capable of delivering a significant quantum of stock over a period of time. We anticipate that, if this is delivered, demand will be good. As noted previously, the proposed Advanced Digital Institute in Shipley may stimulate demand for similar or off-spin type uses in Shipley and it is difficult to see how this could be differentiated from the proposed use / occupier profile for Bingley Technology Park. As noted previously, the Council should adopt a flexible position in respect of granting planning consents at the Park so as not to preclude other uses should demand exist.

The Keighley market is more concerning however, there is a need to ensure that the best quality sites are protected however, there are a number of poor quality sites which could potentially be deallocated. This will bring a focus on the remaining allocations and hopefully bring some clarity to what is currently a very confusing / unregulated market spatially with a seemingly endless supply of poor quality outmoded second hand stock.

4.5.5 Wharfedale

Wharfedale will continue to thrive on the success of Ilkley as a town centre. There will therefore, always be a level of demand some of this will merely be the recycling of uses and property however as its economy grows so too will a number of businesses therefore a direct increase in the number of properties required will result.

4.6 Summary

Proposals for transformation and change in Bradford are already demonstrating an influence on the property market. This is because providing clear messages about the role and function of an area gives the market confidence and certainty.

Establishing a central business district in Bradford City Centre will unlock latent demand for modern Grade A premises. Proposals for the Advanced Digital Institute in Shipley are gaining momentum and Bingley has carved out a clear employment role and identity and provides good quality premises.

Keighley however, is a location which significant improvement in the quality of its office and industrial space is required. There are some good examples which command good rents to reflect this. In addition the role and function of employment areas in Keighley require stronger definition and identity.

5 Current Employment Land Supply in Bradford District

5.1 Introduction

This section provides a current snap shot of employment land supply in the district. It examines the amount of land available based on analysis of primary data supplied by BMDC. The section also explores the constraints and opportunities associated with the location of the current portfolio. This is linked to an understanding of the role of Bradford’s settlements and neighbourhoods.

This section is a review of employment land supply in the district, key employment sites in each settlement have been used to emphasise opportunities and issues with the current portfolio. These sites are not characteristic of the whole supply across the district, but reflect specific areas of constraint or opportunity.

Analysis of current employment land supply is included in Appendix B.

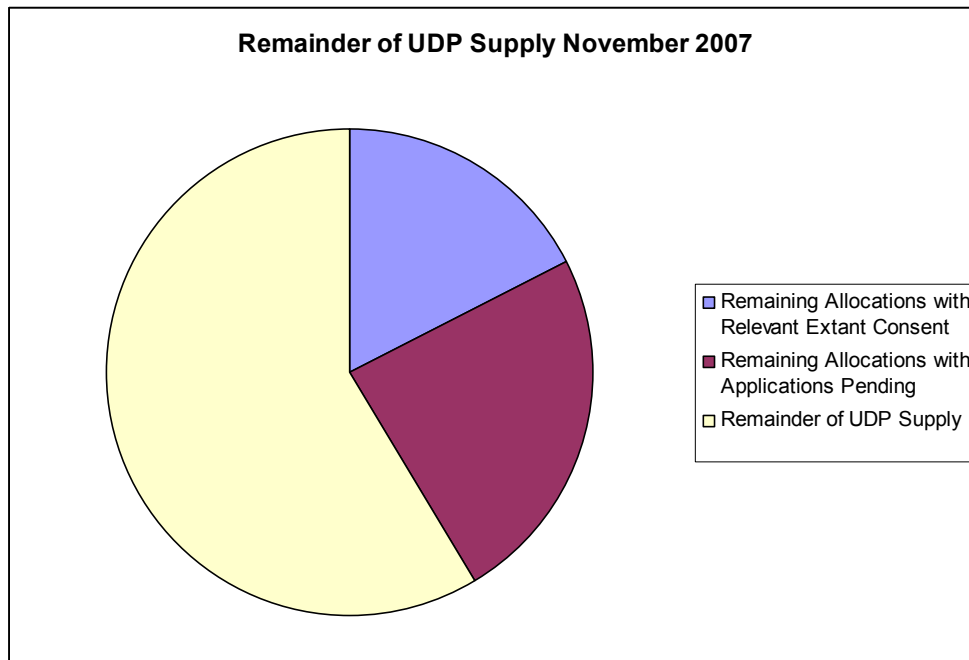
5.2 Current Supply

5.2.1 Amount of Employment Land

Based on our review of the portfolio of employment sites allocated within the replacement UDP, 159.13 Ha of allocated employment sites remain to be developed⁴.

Of these allocated undeveloped sites, 26.47 Ha of land have an extant consent for employment uses, whilst planning applications are currently pending on a further 36.38 Ha of land. There is therefore, the potential for approximately 63 Ha of employment land to be developed in the next 5 years. This would leave approximately 96 Ha of allocated employment land.

Figure 5.1 Breakdown of RUDP Supply for November 2007



Source Arup, using Bradford District Council primary data

5.2.2 Size Profile

Of these remaining sites, there are seven allocated sites over 5 Ha (including the amalgamation of four allocated sites at Beechcliffe, Keighley), twenty-four sites between 1 and 5 Ha, and twenty eight sites under 1 Ha.

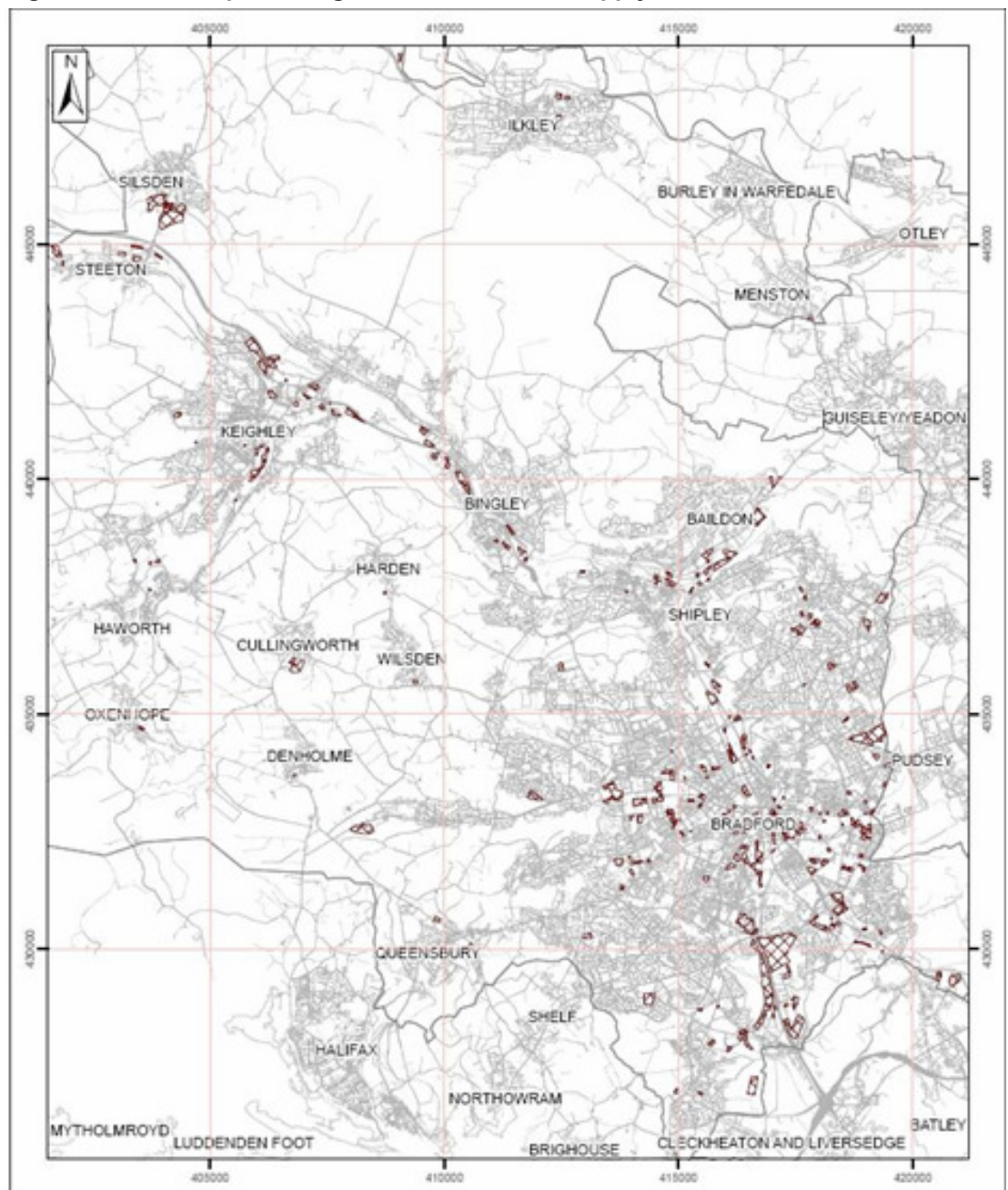
⁴ Since completing the assessment of employment land supply two further sites have been identified, Keighley Road, Silsden, and Sykes Lane, Silsden.

5.2.3 Historic Take-up

Historically the main take up of employment land has focused on the Bradford South and North areas, predominantly as a result of the greater level of employment allocations within these areas but also reflecting the primacy of Bradford as the main settlement within the District. Between January 1993 and March 2006, 68.66 Ha of allocated employment land in Bradford North was taken up for employment purposes with 65.74 Ha of allocated employment land being taken up for employment uses in Bradford South, with the third largest take up rate for employment being within the Keighley constituency (28.78 Ha of land being taken up over the same time-period). The profile of this take-up is characterised by peaks and troughs. The peaks in take-up can be explained by development of the larger sites in the portfolio.

5.2.4 Location of Current Supply

Figure 5.2 Map showing location of current supply in Bradford District



The map shows an even spatial distribution of employment land across the district reflecting the RUDP strategy to distribute employment land allocations across the district rather than cluster sites in strategic locations.

5.3 Deliverability Issues of Employment Sites

5.3.1 Introduction

This section provides a summary of the issues and potential for deliverability of RUDP allocated employment sites that are yet to be developed. A detailed appraisal has been undertaken of the individual sites in order to inform the review.

5.3.2 Ilkley, Steeton and Silsden

There are 2.27 Ha of land currently allocated for employment in Ilkley, Steeton and Silsden⁵. There is a single vacant site in Ilkley that is allocated for employment uses, with the site at Little Lane (CBMDC Ref: KY/E1.10) having been recently developed. The remaining site at Ashlands Lane is 1.03 Ha in size and currently performs a function as open space. The lack of readily available employment sites in Ilkley combined with the potential demand for work / live space and small business units means this site could make a valuable contribution to Ilkley's employment offer. The deliverability of this site is dependant on securing suitable access to the site, and as such it is likely to be available in the medium term.

There are also question marks about the type of employment development being delivered within Ilkley, this settlement mainly having a demand for small units for start-up business and creative industries. The site at Little Lane offered an opportunity for the deliverability of this offer, however the development which has commenced will not cater for this employment demand. Within Ilkley, Steeton and Silsden 0.68 Ha of land is available in the short term, 1.03 Ha are available in the medium term, and 0.56 Ha are available in the long term.

5.3.3 Keighley

The current supply of allocated land within Keighley totals 19.9 Ha. The vacant sites in Keighley that are allocated for employment uses have remained undeveloped for a number of years. Our assessment characterises the sites located in the south of the town as poor performing with poor environmental quality resulting in issues of viability and market stagnation.

Keighley offers a predominance of sites compared to other areas within Airedale, with the best sites clustered around the Aire Valley Road and the Beechcliffe Area. However there are also poorly performing sites within the town of note, being the sites to the south of the town which suffer from poor transport links.

The development of the Old Gas Works site has the potential to deliver a good quality employment site, however there is an opportunity to link this scheme with wider environmental and infrastructure improvements to the area.

Whilst there are some sites within the Keighley area which are available in the short term, sites around the Beechcliffe area, Dalton Lane and Aire Valley Road (in the proximity of the Old Gas Works site) are likely to suffer from contamination and as such remediation is necessary before development can commence. Within Keighley 6 Ha of land is available in the short term, 2.5 Ha in the medium term and 11.4 Ha is not available until the longer term.

5.3.4 Shipley & Baildon

There is 9.13 Ha of employment land available in Shipley and Baildon. This land is not located in close proximity to Shipley Town Centre, with the major employment uses in this area being located in the vicinity of Otley Road, where the allocated sites are located. The sites within Shipley may potentially suffer from contamination issues. Within Shipley and Baildon 8.15 Ha of land is available in the short term and 0.98 Ha is available in the long term.

Of the un-developed sites within Shipley, two are available short term, with one site being available long term.

⁵ Since completing the assessment of employment land supply two further sites have been identified, Keighley Road, Silsden, and Sykes Lane, Silsden.

5.3.5 Bingley, Cullingworth and Wilsden

Within Bingley, Cullingworth, and Wilsden there is 13.96 Ha of employment land available. There are real opportunities within Bingley to further develop a high-quality business offer through the development of the Auction Mart and Coolgardie Farm; these sites have been identified as potentially contaminated and this will need to be addressed in the development of the sites. However, additional opportunities for growth beyond these sites are limited, with only 2.9Ha of allocated employment land remaining to be developed (with an additional 0.92Ha of land which was formerly allocated for employment uses). The Castlefields area also suffers from potential contamination issues being located within 250m of a recorded landfill.

Of the sites located within Bingley, four are available short term delivering 7.53 Ha of land, with one site available medium term delivering 0.59 Ha of land. Bingley offers immediate opportunities for development both through co-ordinated initiatives such as the Bingley Technology Park and stand alone sites such as the land adjacent to the Airedale Route, Crossflats (CBMDC Ref: E/SH/20/0003/00). Of the two sites Cullingworth an additional 5.22 Ha are available in the medium term and an additional 0.62 Ha are available in the long term at Wilsden.

5.3.6 Bradford West

14.3 Ha of land is allocated in the RUDP for employment within Bradford West. The sites within Bradford West are generally dispersed and sporadic with some located on the outskirts of the city centre and some sites in the settlement of Thornton. This gives the impression of lack of coherence between sites and emphasises the predominance of infill sites. This area is not a key location for employment uses within the District; however there are some well established users along Thornton Road and Legrams Lane/Listerhills Road which make these popular employment areas. The eastern section of this constituency is close to the City Centre and will benefit from the regeneration schemes within the centre.

Within Bradford West five sites are available short term delivering 6.53 Ha, and three sites are available medium term which will deliver 7.77 Ha of land. There are contamination issues surrounding sites around Manningham and Listerhills Road, particularly relating to the Land north of Legrams Lane (CBMDC ref: E/BW/27/0008/00, which is a former petrol station and also has elevated mine gas readings).

5.3.7 Bradford South

Bradford South has the largest employment land supply within the Constituencies of the District with 82.35 Ha of land allocated through the RUDP for employment purposes. This area incorporates access to the M606 which has generated a considerable industrial and distribution presence in Low Moor and Staithgate. This area serves as a key location for the District, however there is a creeping office presence. It is important that this is distinguished from a potential City Centre offer.

The popularity of this location is reflected in the recent commencement of works to construct new industrial units on land at Staithgate Lane and the submission of applications to develop the former golf course at West Bowling. The West Bowling site is likely to come forward within the short term (dependant on whether planning permission is obtained for the development) for predominantly B8 use with large scale distribution proposed.

The area also incorporates the peripheral areas of Wyke, Tong and Wilsden, which incorporate small allocations of employment land which have been allocated primarily to meet the needs of existing users and allow for small-scale employment expansion.

Within Bradford South nine sites are available in the short term, nine sites are available medium term, with two sites available in the long term; 62.61 Ha of land is available short term, 16.86 Ha of land is available medium term and 2.88 Ha are available in the long term.

5.3.8 Bradford North

17.22 Ha of land is allocated through the RUDP for employment in Bradford North. Bradford North incorporates a mix of allocated sites within traditionally industrial areas and larger

strategic sites, allowing for aspirational change alongside the maintenance of existing employment uses. This area also incorporates the Canal Road Corridor, which serves as the location for a number of B2/B8 uses, but has the potential to see a shift in employment uses through the implementation of the Canal Road Corridor Masterplan. This area is however, largely devoid of additional employment sites and such a change will need to consider the relocation of existing uses.

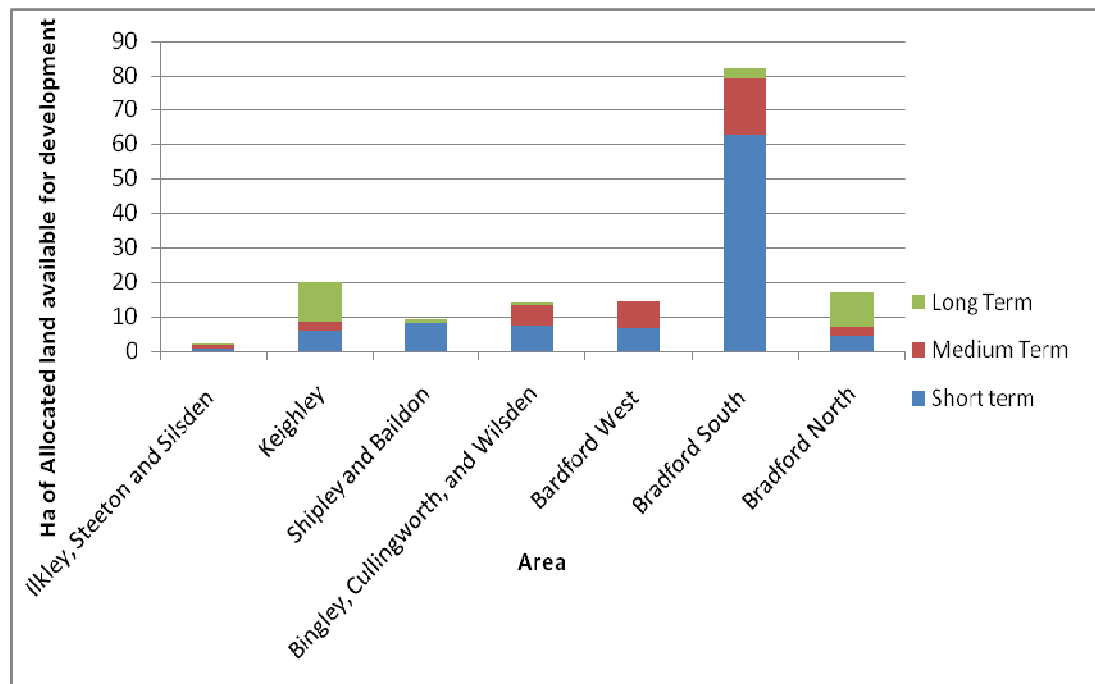
The land at Woodhall Road, Thornbury (UDP ref: BNE1.17) will be released for employment uses if the bakery consolidates its operations providing a necessary road frontage. This comprises of 9.85 ha and is likely to come forward for development due to the deliverability of the site, its location adjacent to Morrison head quarters and proximity to the main road network. However there is also considerable pressure for housing development within this area, particularly within the vicinity of Dick Lane.

This Constituency also includes the Bowling Back Lane area, incorporating a predominance of General Industrial uses. This area is performing well, and there is clear interest in this site, indicated by the presence of new industrial units.

Within Bradford North four sites are readily available within the short term delivering 4.39 Ha of land, one site will become available in the medium term delivering 2.55 Ha of land, with two long term available sites delivering 10.28 Ha of land.

The current supply of allocated sites within the settlements, having regard to their availability in the short, medium or long term is summarised below.

Figure 5.3 Availability of RUDP Supply November 2007



5.4 Summary

The RUDP allocation of employment sites has resulted in a wide spread distribution of supply in settlements and neighbourhoods across the district. Analysis of current supply shows the following:

- as of November 2007 there is a total of 159.3 ha of allocated employment sites which are yet to be developed;
- this comprises 28 sites under 1 ha, 24 between 1 and 5 ha and 7 over 5 ha
- if extant consents and planning applications are considered then the supply of allocated sites is reduced to 86 ha⁶; and
- the remaining supply is predominantly located in the Bradford South constituency.

Historically the Bradford North and South constituencies have had the highest rate of take-up and been the most popular locations for business. The average rate of take-up across the district over the last ten years has been 14.6ha, although the take-up profile is characterised by peaks and troughs as large sites come forward for development.

The constraints associated with this supply relate to the lack of variety of sites with a predominance of smaller sites under 5 ha, poor quality sites with physical limitations such as contamination and accessibility. The current supply can be characterised as infill or expansion sites with the exception of a few strategic sites. The nature of this supply means it is challenge to bring this forward and market for immediate availability to meet modern business demands.

⁶ Since completing the assessment of employment land supply two further sites have been identified, Kieghley Road, Silsden, and Sykes Lane, Silsden.

City of Bradford
Metropolitan District
Council

**Bradford Employment
Land Review**

Final Report

**PART TWO: FUTURE
CHANGE**

December 2007

6 Future Economic and Spatial Change in Bradford

6.1 Introduction

Bradford has ambitions for significant change and economic growth. This is demonstrated by the transformational regeneration schemes in Bradford city centre, and across the district. This section details the regional and local policy framework and strategic ambitions for Bradford district in order to achieve this transformational change.

This section sets out the potential future economic profile of Bradford up to 2016 as a result of this economic change. It examines the sectors which are projected to grow, and the challenges facing the district as a result of this change. It also explores the future requirements of small business and start-ups. In order to understand the growth sectors this section uses the unconstrained growth scenario data from the Regional Econometric Model. The unconstrained growth scenario is explained in Chapter 8; this scenario plans for ambitious levels of growth in the district.

This section also examines the emerging RSS and LDF spatial strategies and the regeneration proposals for the district to understand the implications for location of employment land and the spatial response to transformational change.

6.2 Status of Regional and Local Planning Policy

The draft RSS published by Yorkshire and Humber Assembly in 2006 has been modified following the recommendations from the Examination in Public and the subsequent Secretary of State's Proposed Changes in 2007. Therefore the Proposed Changes to the draft revised RSS September 2007 (referred to as the RSS Proposed Changes) form the basis of this regional review.

It should be noted that the policy position set out in the RSS Proposed Changes will be subject to further change as this document is currently undergoing a period of public consultation. The final version of the RSS is scheduled to be issued in spring 2008.

Local planning policy is also going through a period of change. The Bradford Replacement Unitary Development Plan (RDUP) was adopted in October 2005, policies and proposals will be 'saved' until at least October 2008. A range of new Local Development Documents are to be produced and added to the LDF.

6.3 Economic Policy Aspirations

6.3.1 Ambitions for Growth

Bradford has aspirations for transformational change. Economic policy at the regional and local level seeks to position Bradford district strategically within the Yorkshire and Humber region and recognises the competitive opportunities the district can bring in driving forward the region's economy. Regional strategy supports this vision by setting ambitious housing growth targets for the district. In comparison to the other authorities in West Yorkshire, Bradford has a significant allocation of new housing and potential jobs growth.

Housing

A requirement in the SoS Proposed Changes to draft RSS for **2700 net additional dwellings** per annum between 2008 – 2021.

Employment

A potential growth target in the SoS Proposed Changes to draft RSS of **4,720 jobs per annum** (this is the second highest potential jobs growth in West Yorkshire)

Key policy documents such as the Regional Economic Strategy (RES, 2006), the RSS Proposed Changes (2007) and the Economic Strategy for Bradford district (2007) recognise

significant opportunity to expand sectors of the knowledge economy. Continued economic growth and job creation is envisaged in business, professional and service sectors; with the financial and business services sector projected to grow by over 11%. This sector is seen as having an important role in realising Bradford's ambitions for economic growth.

Economic policy also recognises the role emerging sectors such as design and technology, construction, education and health have to play in Bradford's changing economy. The RES supports growth in the digital media sector, as this is one of the regional priority growth clusters. Leeds CRDP2 (2006) also highlights the important role Bradford University plays in driving forward growth in the health sector through established links with medical companies in the district.

Table 6.1 Projected Change in Full Time Employment by Sector for Bradford Between 2006 and 2016

Sector	FTE Jobs 2006	FTE Jobs 2016	+/- change	% change from 2006
Offices B1(a)	32,982	45,296	12,314	37
Manufacturing / Industry B1b/c and B2	40,331	48,309	7,978	20
Storage / Distribution B8	17,484	21,440	3,956	23
Retail, Leisure & Catering	28,034	35,956	7,922	28
Health & Education	33,840	41,444	7,604	22
Other Public Services	9,044	8,624	- 421	-5
Primary / Utilities	1,949	1,490	- 459	-24
Miscellaneous	21,579	29,894	8,316	39

Source *REM Unconstrained Growth Scenario (2006)*⁷

Table 6.1 shows forecast job growth for Bradford district using the unconstrained growth scenario. There is a significant increase in jobs in office based employment. This comprises of jobs in banking and insurance, business services and other financial and business services. The table also shows growth in manufacturing and industry, and storage and distribution uses. In particular the manufacturing sector accounts for 40,000 jobs in 2006 and is projected to grow by 20%. This sector accounts for one in ten businesses in the district and is an important established sector for the district. The RSS Proposed Changes recognises the continued economic opportunities the manufacturing sector offers and supports the need for this sector to modernise in order to remain competitive.

The highest percentage growth overall is in jobs classified as miscellaneous. This includes a percentage of industries from construction, transport, communications and other services. The other important growth sectors in Bradford are in retail, leisure, catering, health and education. These sectors do not fall within the Business (B1), General Industrial (B2) or Storage or Distribution (B8) classes of use as prescribed by the Town and Country Planning (Use Classes) Order 1987, as amended; as such they are not considered in the

⁷ The total forecast job growth is identical to that set out in table 11.2 of the RSS; however, some of the sector break downs are slightly different. This is because for this study a slightly later version of the REM was used.

employment land demand analysis. These forecasts demonstrate the diversity of Bradford's economy and the potential for growth in a range of industries.

Table 6.1 shows the unconstrained growth scenario forecasts an overall decline in the primary utilities and other public services sectors. This will need to be managed effectively as some of the major employers in the district are in the utilities sector.

6.3.2 Innovation, Enterprise and New Business Growth

VAT registrations for 2005 shows Bradford has a relatively high number of business start-ups compared to other authorities in the Yorkshire and Humber Region. This increase combined with a steady decrease in VAT de-registrations implies a stable survival rate for business start-ups in the district. The RES recognises the opportunities this SME growth offers and identifies Bradford as being a 'seedbed for enterprise and opportunity'. Economic policy supports entrepreneurship and increased SME survival rates through the provision of incubator units and innovation centres in the district.

If survival rates continue over the medium to long term it will be important for Bradford to provide the necessary business infrastructure to support maturing small and medium sized enterprises. This includes provision of grow on premises and varied work space to allow for relocation to meet changing needs.

Within the district the outlying settlements in Wharfedale and Airedale have an important role to play in providing the necessary infrastructure to support small businesses from start-up through to graduation. Airedale is already the location for Keighley Business Centre and Aire Valley Park. There are further plans for other small business spaces such as Dalton Innovation Centre, Keighley Gas Works site and incubator units at Bingley Technology Business Park.

In towns such as Ilkley and Burley in Wharfedale, and Keighley and Bingley in Airedale the provision of work/live units and graduation space could support the successful small businesses and niche industries located in these areas. This is already the location of a number of small business owners and would take advantage of entrepreneurship opportunities in Wharfedale and Airedale.

6.3.3 Economic Policy – Future Challenges

The vision of transformational economic change in Bradford presents a number of challenges for the district. Regional ambitions are for significant growth in housing and employment. This will need to be met through the allocation of appropriate sites to deliver against the regional targets. There is likely to be increasing competition between housing and employment uses for the strategic and popular sites. The pressure of demand for housing land will need to be considered in the employment strategy, particularly in relation to the safeguarding of strategic employment sites. The approach recommended by the RSS Proposed Changes is for a varied employment land portfolio with a choice of sites and it supports the safeguarding of strategic sites that meet requirements of the growth sectors.

The focus of economic policy on regional priority clusters has a significant influence on the type and location of employment land. In order to support growth of office based uses it will be important to provide high quality sites that can accommodate higher density office based developments. There will also be a need for sufficient land in particular locations which will enable the co-location of business which is important to establish these growth clusters. The other important consideration relates to the demands from the small business sector and business start-ups. Smaller scale sites, or a percentage of larger sites will need to be allocated for incubator units and innovation centres. This should be combined with the provision of business infrastructure, connectivity and supporting services.

The analysis shows that Bradford's traditional manufacturing and industrial sectors will still account for a significant proportion of the districts employment. The challenge will to reconcile employment land demands from this sector with high quality sites required by the office based growth sectors. Regional and local economic policy focuses on the growth of the financial and business regional priority clusters without planning for future requirements

from Bradford's established industrial base. Therefore, the strategy for allocation of employment land will need to consider the requirements from Bradford's existing industrial base (particularly medium sized companies) in addition to meeting the policy requirements for growth sectors and small businesses. This includes provision for low quality, low value sites to meet the demands of the manufacturing and industrial sectors.

The skills issue is also an important consideration across the district as there is a risk that an under-skilled workforce will not be able to support Bradford's transformational change. Stakeholders interviewed for this study raised concerns that the skills agenda was not sufficiently addressed in the district. This included concerns over recruitment difficulties in the labour market due to variation between local workforce skills and employer requirements. Sectors currently facing this issue include construction, property development and cross sector managerial skills. Given these issues, it is likely growth in employment will be met in the short to medium term by skilled workers being drawn in from outside the district.

6.4 Emerging Spatial Strategy

6.4.1 Future Potential of the Districts Sustainable Settlements

The Replacement UDP (RUDP, 2005) sought to distribute employment land across the district to ensure an even allocation which favoured all settlements. This strategy has resulted in a range of sites located in peripheral areas of the district as well as economic zones assigned to traditional industrial areas. The RUDP also supported city centre office development along with ancillary office development in out of town locations. The approach to the allocation of employment land in the LDF is likely to be more focused. The Core Strategy Issues and Options Paper (2007) considers the RUDP strategy has led to an over allocation of around 130 ha of employment land. The possible over-allocation will be tested by this study.

A shift in regional and local policy, with an increased spatial focus, means development is now prioritised in the city and district urban centres as these locations are recognised as key economic drivers. The main settlements in the district to focus economic growth are Bradford, which is classified as a Sub Regional Centre, and Keighley which is identified as a Principal Town⁸. Regional and local policy also recognises the popularity and success of Ilkley, Airedale and South Bradford (M606 corridor) as business locations. At a City Region and Regional level policy also focuses on the opportunities offered along the Leeds – Bradford corridor.

As a Sub Regional Centre, regional strategy specifies that Bradford urban area should be the focus for new development including housing, retail, leisure, services and employment. Regional strategy also considers Keighley to be a Principal Town in the district; as such it is considered a secondary location for development after Bradford sub regional centre. The objective of this approach is to ensure development contributes to sustainable settlements across the district.

6.4.2 Spatial Distribution of Employment Land – Future Challenges

The shift in policy direction favours city and town centre development focused on brownfield sites. This strategy supports economic development in the regeneration areas particularly Bradford city centre, along the Canal Road Corridor and within some areas of Airedale. Regional and local policy direction means office development should be focused in the city centre with industrial and distribution uses directed towards established employment areas within Bradford urban area and around Keighley.

The employment land strategy will need to consider how outlying settlements appropriately contribute to meeting employment needs. Locations that are independent of Bradford urban area and support their own catchment, such as Steeton and Silsden can potentially play an important role in providing a mix of housing and employment use. Any development

⁸ RSS Proposed Changes (2007)

considered for these locations should take account of the complementary role these settlements have with Keighley.

Settlements in Wharfedale, such as Ilkley, will also need to plan for employment land to meet demand for small to medium sized high value, quality office space. Future availability in Wharfedale is likely to come from recycling and re-development which emphasises the importance of allocated and existing employment land being retained for employment uses.

6.5 Regeneration Proposals

6.5.1 Priority Regeneration Areas

A number of key policy documents (RES, RSS Proposed Changes, City Centre AAP Issues and Options, and Economic Strategy for Bradford District) seek to build on the existing success in the district by focusing future development in the districts priority regeneration areas. These are:

- Bradford City Centre with its four regeneration areas located in The Bowl, The Market, The Channel and The Valley;
- Airedale;
- Canal Road Corridor; and
- Manningham

The RES (2006) and the Economic Strategy for Bradford view these regeneration areas as having an important role to play in changing perceptions and improving the quality of Bradford district to attract inward investment and retain existing employers. The RSS Proposed Changes also views these areas and other mixed use developments as providing an important contribution to employment land supply. A summary of the regeneration areas and employment specific proposals are detailed in Table 6.2 below.

Table 6.2 shows the regeneration proposals seek to deliver high quality office space and mixed use commercial schemes. In the City Centre, along the Canal Road Corridor and in parts of Airedale the regeneration proposals plan for changes to existing industrial areas. This includes the general industry and manufacturing located on the periphery of the city centre and in sites along Dalton Lane in Keighley. These uses play an important role within Bradford's economy but require low quality and low value employment land. There is a risk the regeneration schemes will force these types of uses to relocate elsewhere, potentially outside the district. This is acceptable provided appropriate locations within the district are identified to accommodate such uses.

Table 6.2 Summary of Regeneration Proposals Including Provision of Office and Industrial Space

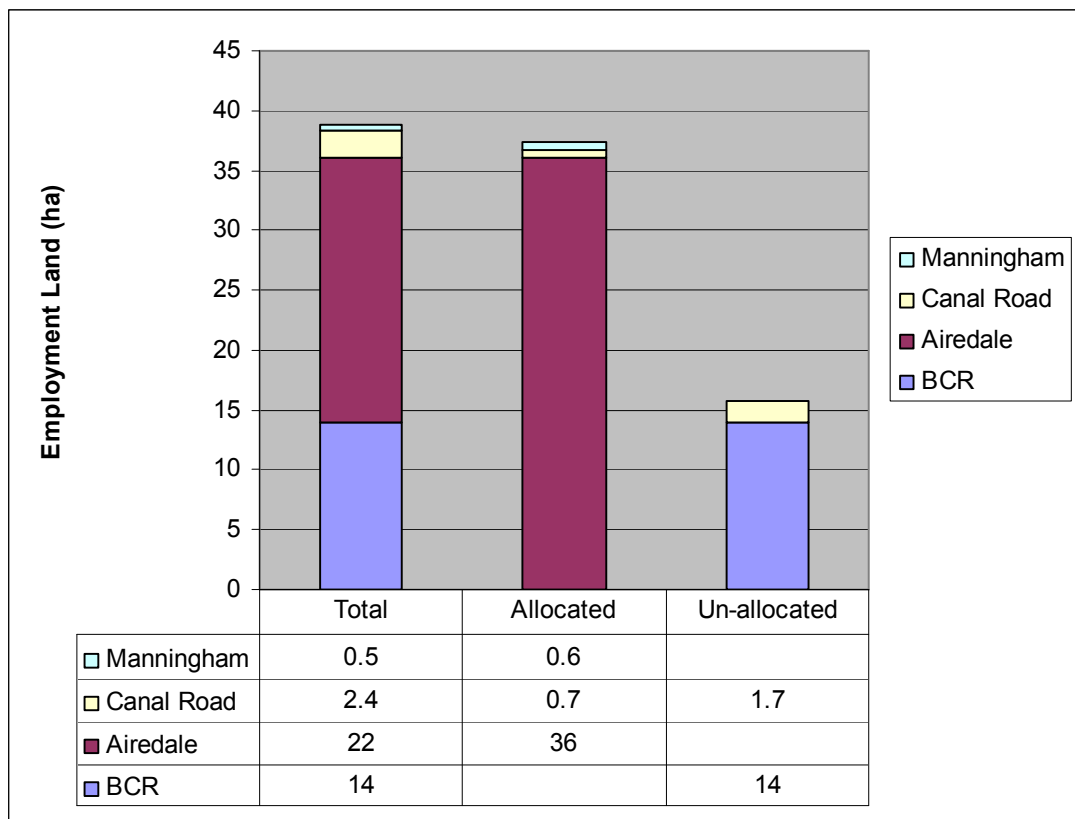
Regeneration Area	Employment Related Proposals	Amount of Proposed Office / Industrial Space
City Centre	The Bowl: Business Forest The Channel: Office Space The Valley: Incubator Space	Minimum of 14 ha of office space Over a 15 year period
Airedale	Hard Ings Business Improvement District (Keighley) Bingley Business Technology Park Dalton Lane (including Dalton Mills) Castlefields Enterprise Park Silsden Rural Business Park	9.1 ha industrial space 13.1 ha office space Over a 15 year period

Regeneration Area	Employment Related Proposals	Amount of Proposed Office / Industrial Space
	Dockfield Road Business Park Beechcliffe Sustainable Business Park Esholt R&D Campus	
Canal Road Corridor	Bradford Waterfront Queens Road Olivers Locks and High Street Midlands Commercial Oswin Mill Shipley College	2.4 ha of commercial, office and light industrial space Over a 15 year period
Manningham	Lister Mills Drummond Mill 'Enterprise Island'	Space for incubator and small office units (estimated 0.5 ha)

Source *BCR, Airedale Masterplan, Canal Road Corridor Masterplan, and Manningham Masterplan*

Figure 6.1 shows the amount of allocated employment land within the regeneration areas. Compared to the amount of floorspace outlined in the proposals, the Canal Road Corridor has less than a hectare of allocated employment land. This scheme is dependent on delivery from un-allocated and windfall sites. In contrast Airedale has a greater amount of allocated employment land (36 ha) compared to the amount planned for in the proposal (22 ha).

Figure 6.1 Comparison of Allocated and Un-Allocated Employment Land for Bradford’s Priority Regeneration Schemes



6.5.2 Regeneration Proposals – Future Challenges

The analysis of Bradford's regeneration proposals highlights the schemes focus on delivery of high quality office space across the district. The employment land strategy will need to consider whether all the regeneration schemes should provide employment land to cater for the districts office based growth sectors or whether this should be focused only in the city centre.

The employment land strategy will also consider how to manage existing uses located within the regeneration areas. The areas of general industry and manufacturing may not fit with the vision for regeneration resulting in pressure for these uses to re-locate elsewhere. Therefore the strategy will have to consider providing suitable sites for re-location outside the regeneration areas. This follows the guidance from RSS Proposed Changes (2007) which recommends that an employment land portfolio includes replacement sites for low value industrial uses. These issues will be considered in Sections 9 and 10.

The review of RUDP allocated employment sites located in regeneration areas shows there are no sites within the City Centre and limited provision in the Canal Road Corridor. The employment land strategy will need to consider whether to allocate and safeguard strategic sites in these areas for employment uses or adopt a flexible approach with regeneration schemes bringing forward un-allocated sites for employment uses. In Airedale, the strategy will need to review whether there is an over supply of allocated sites compared to the amount planned for in the regeneration proposals.

6.6 Summary

The strategic ambition for Bradford is to achieve transformational change and economic growth. At the regional level the RSS Proposed Changes (2007) sets ambitious targets for growth in housing and employment in order to achieve this vision. Regional and local strategy also recognises the important role the regions priority growth clusters will play in supporting economic growth in the district. Knowledge economy sectors such as financial and business services are forecast to grow over the next 10 years. Other important sectors projected to strengthen and diversify Bradford's economic growth include design and technology, construction, education and health. This is underpinned by the manufacturing sector which accounts for one in ten businesses in the district.

Regional and local strategy focuses economic growth in city and town centre developments. The spatial distribution of economic growth is likely to centre on Bradford City Centre and in the priority regeneration areas along the Canal Road Corridor and Airedale. In particular the RSS Proposed Changes emphasises the role Bradford and Keighley play in future growth in housing and employment due to their classification as a Sub Regional Centre and Principle Town within the region.

Significant change is anticipated in the regeneration areas with many of the proposals planning for office or mixed use developments. In particular, the Business Forest Office Park in the City Centre will offer high quality large scale office space. Office developments are also proposed in Airedale in Bingley and parts of Keighley as well as the more peripheral locations of Esholt and Steeton and Silsden. The challenge for the employment land strategy will be managing this transformational change to meet the needs of the regional priority growth clusters whilst continuing to support the districts established industrial and manufacturing sectors.

7 Projected Demand for Employment Land

7.1 Introduction to Modelling

In order to analyse possible future demand for employment land, this section outlines a number of scenarios based on employment land monitoring returns, commercial and industrial floorspace analysis and Regional Econometric Modelling (REM) data which forecasts change in employment across the district. All the scenarios are modelled up to 2021.

The methodology used in this section aligns with OPDM guidance for employment land reviews. A range of methods are used in order to provide a robust evidence base and inform the study regarding trends in net additional employment land demand for B1 (office), B2 (industry) and B8 (storage and distribution) use classes.

This section details the justification for chosen method and growth scenario, along with the projected trends for employment land demand from 2006 to 2021. It highlights the limitations of the modelling based purely on historic trends. The Commercial and Industrial Floorspace model is particularly constrained due to the short time period it covers and the assumptions regarding translation of industrial sectors into B1, B2 and B8 uses. The preferred method used for this study is employment land projections based on the Regional Econometric Model transformational growth scenarios derived from regeneration based jobs growth.

It is important to note that the projected demand figures are not absolute; they give an indication of the direction of change if recent trends continue. This enables the study to identify likely future challenges and opportunities as a result of these trends.

7.2 Review of Different Methods

7.2.1 Employment Land Monitoring Returns

Historic take-up rates for land developed for employment uses were provided by Bradford District Council for the five parliamentary constituencies in the district for the period January 1993 to March 2006. All the data was recorded as a gross figure. The data supplied does not differentiate between use classes, therefore all data is shown as annual total take-up of employment land.

In order to calculate the annual take-up rate the data was averaged out on a yearly basis. This was due to the data being collated into 9 time periods ranging from just over 3 years in duration (January 1993 – March 1996) to 6 months in duration (July 1997 – December 1997). The inconsistency in time periods meant it would be difficult to understand take-up trajectories and project forward, unless the data was firstly calculated on a yearly basis. The annual take-up rates were projected from 2006 – 2021 as a straight line forecast.

Employment Land Monitoring Returns – Limitations and Advantages

The limitations of this approach are:

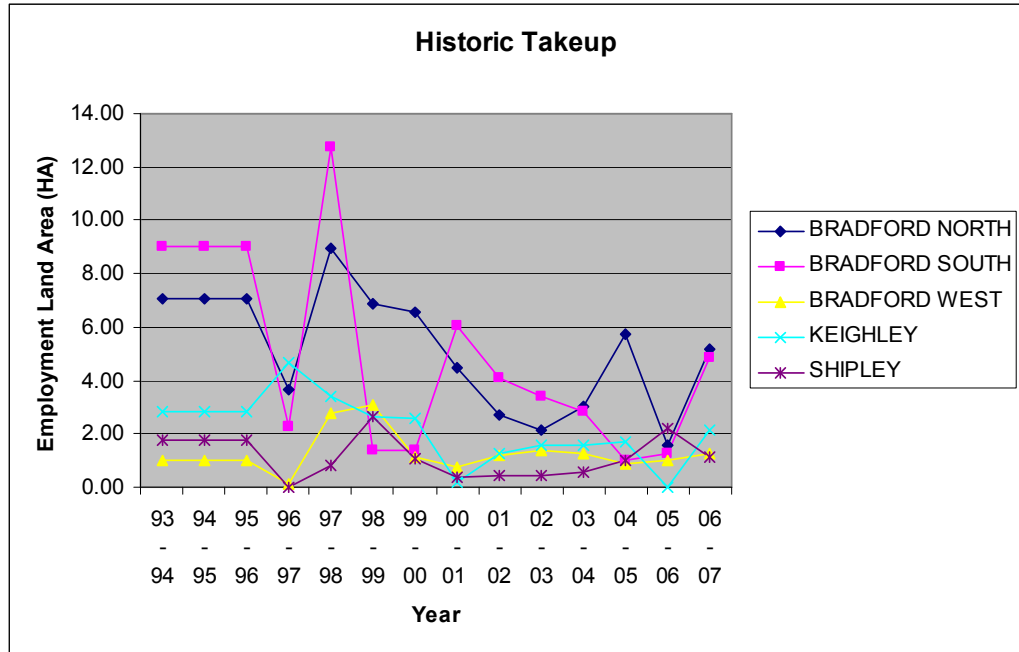
- For some financial years the data represents average take-up rather than actual take-up for that financial year;
- It does not consider employment land developed or re-developed for non-employment uses (ie. employment land lost to other uses)
- There is no differentiation between B1, B2 and B8 uses; and
- It does not take account of any losses through re-development for other uses.

The advantage of this method is it shows historic trends on a financial yearly basis starting from April 1993. This provides useful evidence of past trends in the district and informs understanding regarding geographic interest. It shows which areas business and industry has considered to be the right location for employment land in the past and also reflects the location of allocated employment land.

Findings

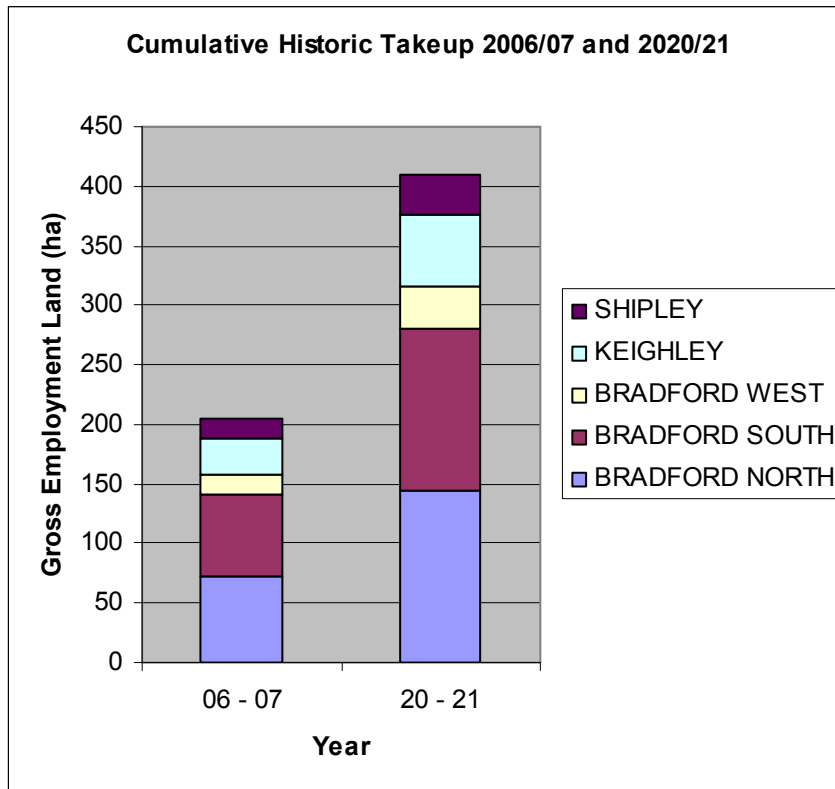
The employment land monitoring returns model shows that average annual take-up rates across the district are 14.6 ha per year. Historically the wards of Bradford North and Bradford South have had the highest levels of take-up of employment land (see Figure 7.1). This is unsurprising considering these areas are the location of larger employment sites allocated in the Replacement UDP.

Figure 7.1 Historic Take-up of Employment Land For Parliamentary Constituencies in Bradford District



Source Bradford District Council (2006)

Figure 7.2 Historic Take-up in Employment Land Projected to 2021 for Bradford District



Source Bradford District Council (2006)

Figure 7.2 shows the projections for the employment land monitoring returns. It charts the total take-up of employment land for 2006 / 07, as well as the projected gross take-up for 2020 / 01. The graph shows an additional gross requirement for 205 ha of employment land between 2006 and 2021. The model predicts, based on historic trends that the highest levels of demand for employment land will be in Bradford South, Bradford North and Keighley.

7.2.2 Commercial and Industrial Floorspace and Rateable Value Statistics (2005) ODPM

Commercial and Industrial Floorspace and Rateable Value Statistics are based on Valuation Office Agency (VOA) data⁹ to produce statistics on floorspace and rateable values for non-domestic properties in England and Wales, and provides data on the total stock of floorspace for the years 1998 – 2005. The floorspace data is differentiated by office, industrial and warehousing type. ODPM¹⁰ states that an approximation to the main groups of use classes (B1, B2 and B8) may be taken directly from the bulk classes (office, industrial and warehousing).

The floorspace statistics are extrapolated to 2016, based on the average incremental increase between 1998 and 2005. The method also requires the conversion of floorspace for different use classes to accommodate variation in measurement conventions used for the VOA data and those used in the other quantitative assessments (see Table 7.1).

⁹ The ODPM collaborates with the Valuation Office Agency and University College London (UCL) to produce this data.

¹⁰ Commercial and Industrial Floorspace and Rateable Value Statistics (2005)

Table 7.1 **Aligning the Area Measurement Conventions**

VOA Use Class Category	VOLA Measurement Conventions	Quantitative Measurement Conventions	Ratio
B1 Office	Net Internal Floorspace	Gross Internal Floorspace	1:1.2
B2 Factory	Gross Internal Floorspace	Gross Internal Floorspace	1:1
B8 Warehousing	Gross Internal Floorspace	Gross External Floorspace	1:1.025

Commercial and Industrial Floorspace and Rateable Value Statistics: Limitations and Advantages

The model has the following limitations:

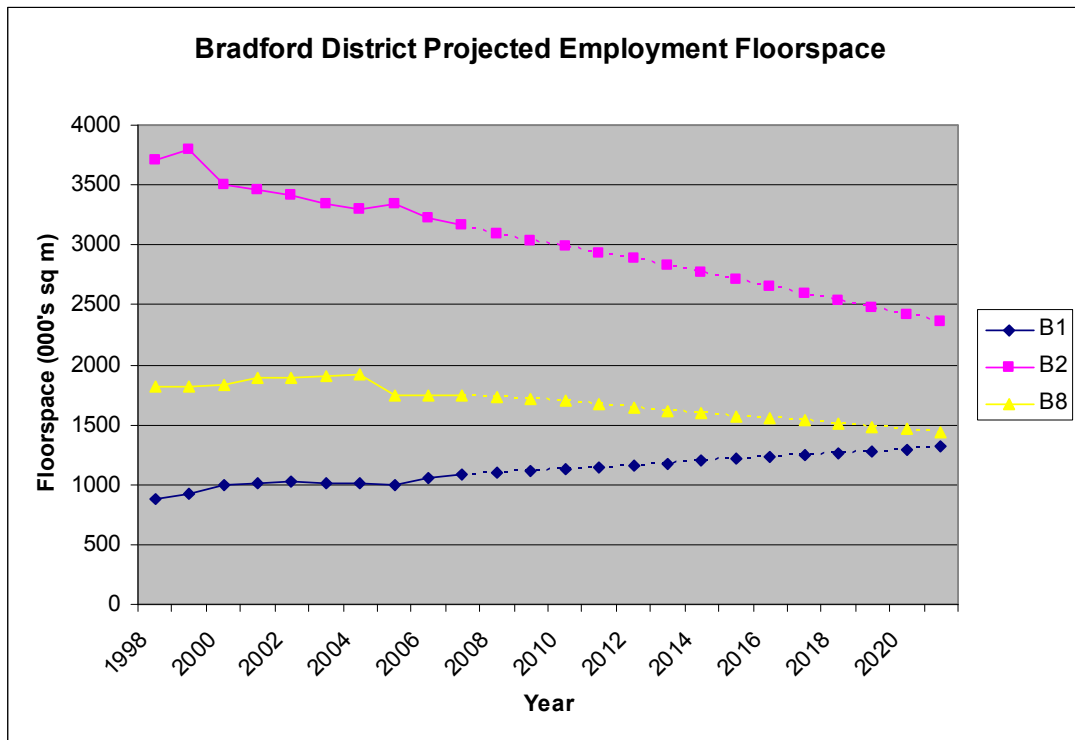
- ODPM acknowledges there are weaknesses to the approach to convert bulk classes directly to use classes, as many B1 (b) and B1 (c) uses are grouped with factories. This skews final results.
- ODPM recognises the classification is not always clear, particularly when a business premises combines activities from different use classes.
- It is currently not possible to separate B1 (a), B1 (b) and B1 (c) in the Valuation Office Agency data.
- The robustness of the statistics is limited by the short time period on which the trends are based.

This model has been investigated as the CLG guidance requires a number of methods to be tested. However, due to the limitations highlighted above, it is not considered to be a robust model to plan for future employment land requirements in Bradford.

Findings

Using the Commercial and Industrial Floorspace Statistics 1998 – 2005 for Bradford District and extrapolating to 2021, the model predicts an overall net reduction of 230 ha of employment land (see Figure 7.4). The model reflects a broad trend of contraction in floorspace requirements across B2 and B8 uses which account for a significant proportion of Bradford districts employment land. Figure 7.3 does show a gradual increase in the amount of land required for B1 office uses.

Figure 7.3 Projected Employment Floorspace Requirements for Bradford District



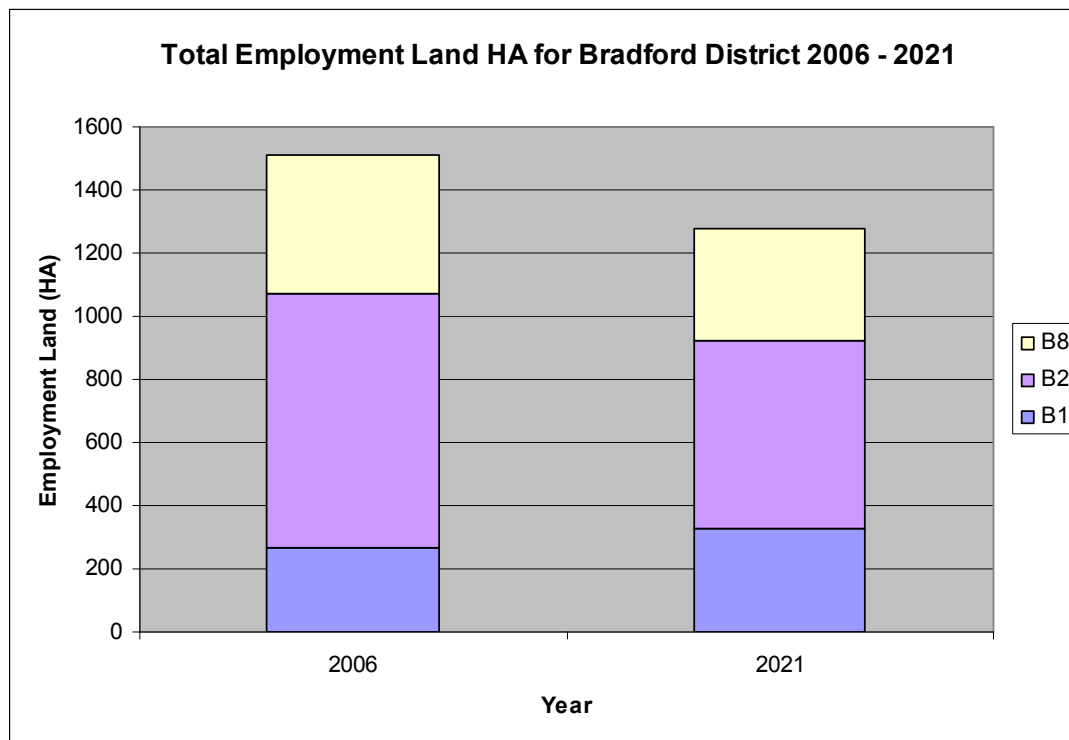
Source CLG Commercial and Industrial Floorspace Statistics (2005)

Figure 7.4 indicates for Bradford District based on recent trends in B1, B2 and B8 floorspace uses:

- A net loss of 216 ha of employment land for B2 (factory) uses representing a 27% reduction against 2006 figures;
- A net loss of 78 ha of employment land for B8 (warehousing) uses which represents an 18% reduction against 2006 figures; and
- A 24% increase in B1 (office) space with a net increase of 63 ha from 2006 to 2021.

The net reduction in employment land is due to the Commercial and Industrial Floorspace Statistics being based on historic trends. While an overall decline in B2 and B8 uses is recognised in this report, the historic nature of this model (based on 2005 data) does not truly reflect Bradford’s changing economy, demonstrated by recent growth in office market sectors and delivery of regeneration schemes across the district.

Figure 7.4 Total Net Employment Land Required for Bradford District Using the Commercial and Industrial Floorspace Statistics



Source *CLG Commercial and Industrial Floorspace Statistics (2005)*

7.2.3 Quantitative Analysis Using Yorkshire Forward’s Regional Econometric Model

The Regional Econometric Model (REM) is the data source used for the final quantitative employment projection. REM has been developed by Experian Business Strategies on behalf of Yorkshire Futures and looks at projected employment change over time. The model takes inputs from historical employment, output, productivity, population estimates and forecasts, and other labour market information to provide historic data and forecasts on 30 industry sectors between 1986 and 2016. The output is used as a policy neutral base dataset for the Yorkshire and Humber Region against which various economic scenarios can be applied.

Scenarios Used for the Bradford Employment Land Review

There are two economic scenarios applied to the REM data which have been used for this study. The scenarios are:

1. **Unconstrained Growth**¹¹ – this scenario applies projected jobs growth from regeneration projects and other significant schemes in Bradford district to the REM base data. This is a capacity led scenario that assumes the projected jobs growth will be realised as a result of the success of these transformational projects. An increase of 25,901 FTEs jobs is applied for Bradford district through the period from 2006 to 2016 as various phases of the transformational projects are delivered.
2. **Constrained Growth**¹² – this scenario takes the unconstrained REM scenario and applies a 32% reduction. This accounts for any double counting or displacement that may occur as a result of applying the transformational jobs growth data to the REM base forecasts.

¹¹ The unconstrained growth scenario has been used by Government Office for the RSS Proposed Changes.

¹² The constrained growth scenario was used to inform the CRDP2 forecasts in jobs growth across Leeds City Region.

It should be noted that REM is updated bi-annually by Experian. Therefore the base dataset for the region is continuously refined as new inputs become available. The next releases of REM will include:

- October 2007 – updated ABI data; and
- January 2008 – updated labour market data based on ONS migration data.

The outcome of these changes means Bradford could see significant increases in full time employment projections. The use of a plan, monitor, manage approach to plan making is important to resolve future change and potential reduction in economic projections. Section 9 of this report specifies recommendations regarding Bradford District Council's management and use of REM updates.

The method to translate REM full time employment data to employment land requirements is specified in Appendix B (to insert in final version of the report). The method applies a number of assumptions which are listed below:

- The REM classifies full time employment information by Standard Industrial Classification (SIC) Level 2 categories. The assumptions to convert SIC 2 categories to B1, B2 and B8 use classes are based on recommendations from the GLA study (2002). This specifies the percentage allocation of jobs from SIC categories to B1, B2, B8 use classes.
- In order to understand the gross internal and external floorspace per worker, assumptions are applied regarding employment densities based on the English Partnerships guidance¹³.
- A standard plot ratio of 40% is applied across B1, B2 and B8 uses. This assumes that a building occupies 40% of the total plot of employment land with the rest given over to ancillary uses (such as car parking). The assumption is based on figures referenced in the ODPM 2004 guidance.
- An assumed 'ideal' vacancy rate is applied for employment land scenarios up to 2016. This figure is derived from Leeds and Richmondshire Employment Land Reviews¹⁴ which use an overall figure of 5% for B1, B2 and B8 uses.

Quantitative Model using REM - Limitations and Advantages

Using the REM data has the following limitations:

- A number of assumptions are applied to convert full time employment data to employment land requirements (see points above)
- REM is modelled to 2016, a straight line projection is applied to forecast full time employment change from 2016 to 2021
- The model is based on historic and forecast changes to full time employment which can lead to negative trends in some sectors where productivity is actually increasing

The advantage of using REM is it provides a consistent view of employment change across the region using a variety of inputs and considerations. The range of inputs and complexity of REM means it has a more robust output compared to the other models used to forecast employment land requirements. Therefore the Regional Econometric Model will be used to forecast employment land demand for this study.

¹³ English Partnerships (2001) Employment Densities: A Full Guide

¹⁴ Leeds Employment Land Review (March 2006) and Richmondshire Joint Employment Land Review (January 2007)

Findings

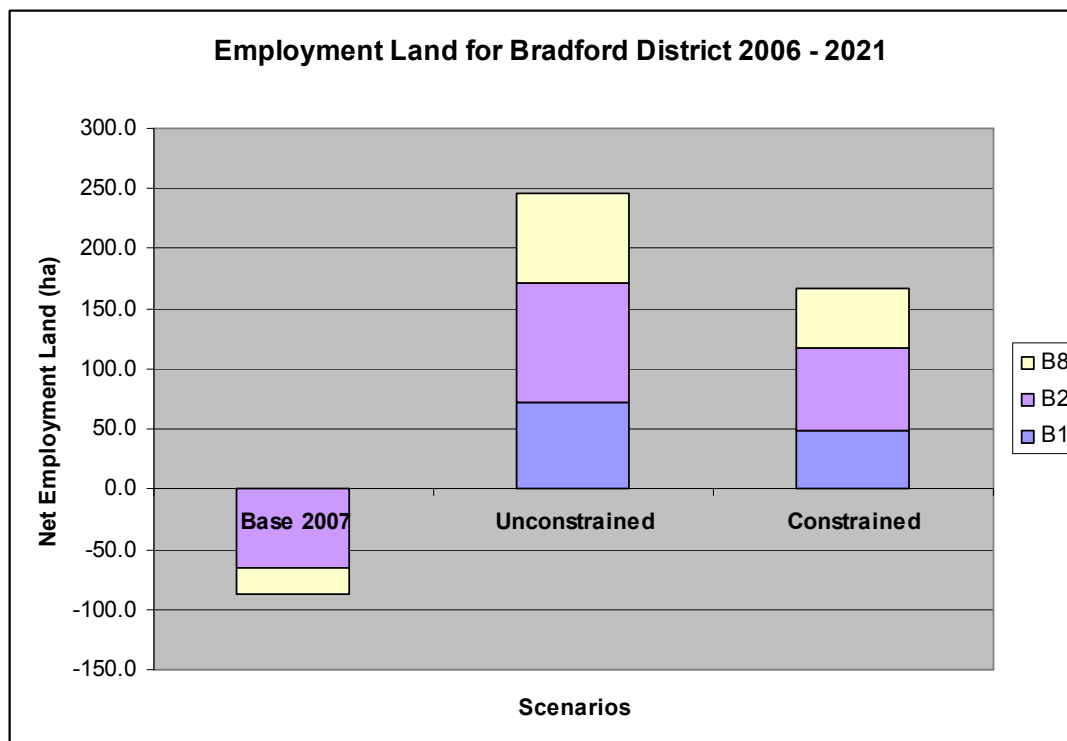
Figure 7.5 shows additional net employment land required for Bradford district up to 2021. The graph shows employment land translation using the REM base data, the unconstrained growth scenario and the constrained growth scenario. The REM base data shows an overall net loss in employment land of -86 ha, with reductions for B2 and B8 uses with a marginal increase of 0.7 ha employment land for B1 uses. This is similar to the trends shown in the Commercial and Industrial Floorspace Statistics model.

Table 7.2 Comparison of Net Additional Employment Land for Unconstrained and Constrained Growth Scenarios

Use Class Sector	Unconstrained Growth Net Change	Constrained Growth Net Change
B1 office	72.3	49.2
B1 b/c and B2 manufacturing / industry	99.5	67.6
B8 storage or distribution	73.7	50.1
Total	245.5	166.9

Source Arup, using REM data

Figure 7.5 Comparison of Net Additional Employment Land Demand from REM Base, Unconstrained and Constrained Scenarios



Source Arup, using REM data

The unconstrained and constrained growth scenarios both show trends of increased employment land demand for B1, B2, and B8 uses. Section 8 of the report will make recommendations on how employment land in Bradford district can accommodate this demand based on applying the most suitable scenario for future economic change.

7.2.4 Summary of Outputs from the Employment Land Demand Models

Comparison of Outputs from Models: Total Additional Employment Land 2006 – 2021

Employment Land Monitoring Returns = 205 ha (gross figure)
 Commercial and Industrial Floorspace Statistics = - 230 ha (net figure)
 REM Base Model = - 86 ha (net figure)
 Unconstrained Growth Scenario = 245.5 ha (net figure)
 Constrained Growth Scenario = 166.9 ha (net figure)

7.3 Applying Local Assumptions to REM

The REM model has a regional focus and applies a range of assumptions when translating the full time employment figures into employment land requirements. This study has modified the quantitative models assumptions to make them specific to changes occurring in Bradford district.

The study recognises the need for a city centre focus in Bradford district for B1 office supply. As a result the study has modified the plot ratio assumptions:

- Plot Ratio – this has been adjusted to 73% for B1 uses to reflect a greater focus on city centre office market supply.

This differs from the assumptions used at the regional level to inform the draft Regional Spatial Strategy. The plot ratio used for the regional employment land modelling was 40% for B1 uses. This enabled the model to apply a generalisation regarding office density across the whole region. The 73% plot ratio for B1 uses in Bradford reflects the regional and local policy preference for office development to be located in the city centre.

The GLA (2002) study provides a useful explanation regarding the adjustment of plot ratios for B1 office uses. The GLA study reports that office plot ratios in particular will vary widely depending on the number of storeys and the extent of landscaping and parking. The report observes that high-density town centre offices can have plot ratios of 100% or more, while ratios in business parks are typically 25 – 30%. The Peterborough study applies the following town centre and out of town weightings to achieve an average plot ratio:

Table 7.3 Plot Ratio Calculations

Location	% of office floorspace	Plot ratio	m2 land	% land
Business Park	25%	0.4	0.625	45%
City Centre	75%	1	0.75	55%
Average	100%	0.73	1.375	100%

Source *Peterborough Integrated Growth Strategy: Employment Land Review Demand Paper (June 2007)*

The revised B1 plot ratio has been applied to the unconstrained and constrained growth scenarios due to employment policy and strategy in the district directing office development to Bradford city centre. Regeneration activity plans for significant office development in the city centre in conjunction with strategic business parks in Airedale. This approach is a direct response to the issue of dispersed distribution of offices across the city and the absence of a central business district. Based on this evidence, it is appropriate to apply a higher B1 average plot ratio which assumes a greater weighting towards city centre development.

Findings

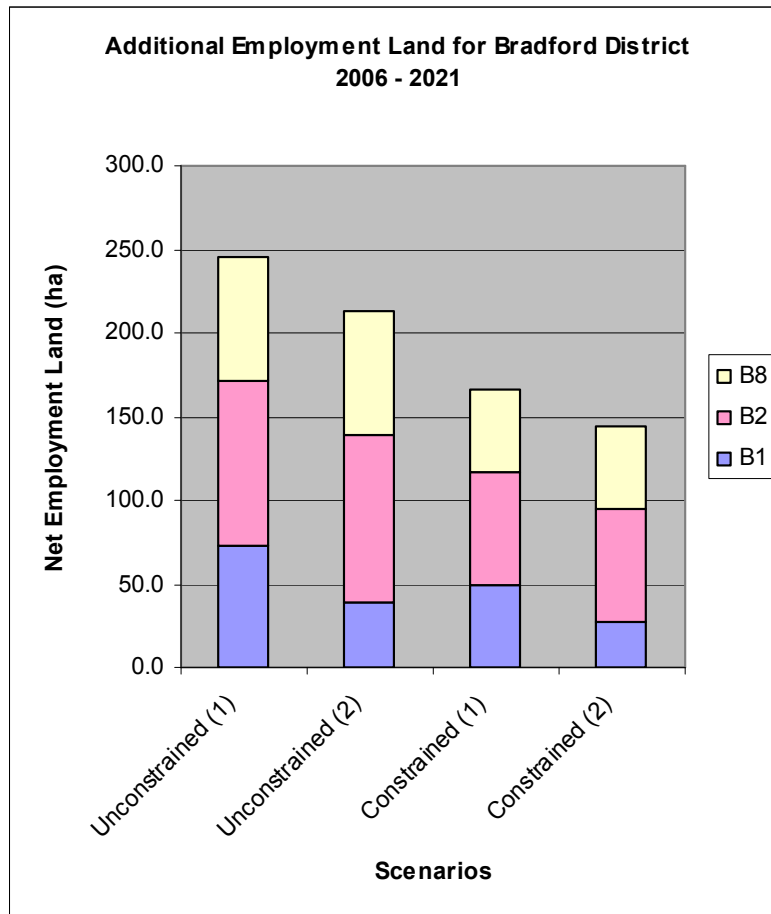
The variation in B1 employment land for the different plot ratio assumptions is detailed in Table 7.4.

Table 7.4 Comparison of Plot Ratios for Unconstrained and Constrained Growth Scenarios

Scenario	(1) 40% plot ratio	(2) 73% plot ratio	Difference
Unconstrained Growth	72.3 ha	39.6 ha	32.7 ha
Constrained Growth	49.2 ha	26.9 ha	22.3 ha

Figure 7.6 shows the unconstrained and constrained growth scenarios as detailed in section 7.2.3. The graph also shows these scenarios with the revised assumption for B1 plot ratio. The change to plot ratio results in a reduction in employment land required for B1 office space.

Figure 7.6 Comparison of Plot Ratios for Unconstrained and Constrained Growth Scenarios



The revised B1 plot ratio means the total net employment land demand is:

- 214 ha for the unconstrained growth scenario; and
- 145 ha for the constrained growth scenario.

7.4 Selecting the Employment Land Demand Scenario for Bradford District

Regional and local planning policy and economic strategy has a vision of transformational change for Bradford (see Section 6). Overall the use of the Regional Econometric Model to

model future employment land demand is considered the best approach for this study compared to the other models examined in this section. This is due to the following:

- REM applies regionally specific criteria relating to population growth and labour market profiles;
- REM is used to forecast regional employment growth to inform the Regional Spatial Strategy; and
- REM is the basis for calculating the unconstrained and constrained jobs growth figures for the district.

When compared to the advantages of the other models the REM model is more robust and uses a broad range of inputs to inform its scenarios for employment growth across the district. In comparison the other models use limited inputs and are based on historic trends, as identified in the limitations and advantages boxes earlier in this section.

As the analysis for future employment land demand shows the modelling which uses the constrained and unconstrained growth scenarios best aligns with regional and local policy direction and Bradford's ambitions for transformational change.

This study recommends applying a range for projected employment land demand using the unconstrained and the constrained growth scenario figures with the revised B1 plot ratio. This is considered the most appropriate as a guide to demand for employment land between 2006 and 2021.

Using a range allows a degree of flexibility to be applied when planning for employment land. The unconstrained growth figures allow the district to plan for ambitious growth in the region and allow for a degree of change in jobs growth as a result of the next planned updates to the REM model. The constrained growth figures provide a revised and achievable view. This allows the demand figures to factor out any over-inflation of jobs figures caused by double counting. In addition the scenario makes allowances for displacement and slower rates of jobs growth from the delivery of the transformational regeneration projects.

7.5 Summary

The method selected by this study to understand projected employment land demand to 2021 is the quantitative analysis using the REM model. The projected demand figures are presented as range comprising of the outputs from the constrained and unconstrained growth scenarios.

In summary the projected net employment land demand for Bradford district between 2006 and 2021 is between 214 and 145 ha. This includes:

B1a = 40 ha to 27 ha

B1 b and c / B2 = 100 ha to 68 ha

B8 = 74 ha to 50 ha

Compared to the other methods the outputs from the REM scenarios align with Bradford's ambitions for growth as they show a positive overall trend. The unconstrained growth figure for total demand is also similar to the historic trend figure used to forecast previous employment land demand. The use of a range in net projected demand for employment land to 2021 allows for flexibility in supply and reduces the risk of planned revisions to the REM model resulting in growth levels that differ from the unconstrained growth scenario. It is important these demand figures are reviewed and revised as part of the monitoring cycle recommended in Section 9.

City of Bradford
Metropolitan District
Council

**Bradford Employment
Land Review**

Final Report

**PART THREE:
FORWARD
STRATEGIES**

December 2007

8 Future Strategy To Meet Projected Employment Land Demand

8.1 Introduction

This section seeks to match demand and supply of employment land in Bradford District, as well as make recommendations on the strategic role of settlements in Bradford to bring forward a flexible, varied and quality supply of employment land.

Section 7 of this employment land review shows there is a projected demand of between 145 ha and 214 ha between 2006 and 2021. This range reflects the unconstrained and constrained growth scenarios for Bradford district derived from the Regional Econometric Model. Section 5 identifies a total available employment land supply of 159.13 ha.

Further details of the quantitative and qualitative assessment of employment land supply is detailed in Appendix B.

8.2 Analysis of Demand and Supply

8.2.1 Introduction

This section seeks to ground overall projected demand in an understanding of what has already been taken up, what particular types of employment land are needed and the requirements of Bradford's planned regeneration schemes.

8.2.2 Review of projected demand

The recommendations of this study are for a range to be used to project demand from 2006 to 2021. The upper and lower figures in the range originate from the unconstrained and constrained growth scenarios detailed in Section 7 of this report.

Scenarios Used for the Bradford Employment Land Review

There are two economic scenarios applied to the REM data which have been used for this study. The scenarios are:

1. **Unconstrained Growth**¹⁵ – this scenario applies projected jobs growth from regeneration projects and other significant schemes in Bradford district to the REM base data. This is a capacity led scenario that assumes the projected jobs growth will be realised as a result of the success of these transformational projects. An increase of 25,901 FTEs jobs is applied for Bradford district through the period from 2006 to 2016 as various phases of the transformational projects are delivered.
2. **Constrained Growth**¹⁶ – this scenario takes the unconstrained REM scenario and applies a 32% reduction. This accounts for any double counting or displacement that may occur as a result of applying the transformational jobs growth data to the REM base forecasts.

Figure 8.1 shows the projected demand for unconstrained and constrained scenarios divided by Use Class.

The projected demand figures are for net employment land demand. This report provides a range in land demand in order to ensure there is an element of choice and flexibility in the supply provided for. Providing a land supply close to the lower end (constrained growth scenario) is ambitious but achievable. Providing a land supply closer to the upper end (unconstrained growth scenario) provides for greater flexibility and choice.

8.2.3 Demand already met by take up since April 2006

The site assessments in Section 5 identified that some of the RUDP allocated sites have come forward for development or construction has commenced since last reported in the

¹⁵ The unconstrained growth scenario has been used by Government Office for the RSS Proposed Changes.

¹⁶ The constrained growth scenario was used to inform the CRDP2 forecasts in jobs growth across Leeds City Region.

LDF Annual Monitoring Report for 2005 / 2006. It has been determined that 19.44 ha has been developed or under construction between April 2006 and November 2007, hence a proportion of the projected demand has already been met. The residual projected demand at November 2007 is therefore between 129 ha for constrained growth and 195ha for unconstrained growth.

8.2.4 Requirements of Regeneration Proposals

The review has highlighted the transformational change taking place in Bradford District. This is partly being achieved through the delivery of regeneration proposals across the district. The significant changes planned as a result of the regeneration proposals will meet a good proportion of the projected demand. Full details of the regeneration proposals are provided in Section 6.

Section 6 makes assumptions about the land requirements of the regeneration proposals. Figure 8.1 shows the amount of employment land required for each of the regeneration areas and the use class sought in each area. Overall the regeneration proposals will require around 40 ha of employment land. This includes RUDP allocated sites located in the regeneration areas.

Figure 8.1 Comparison of requirements of Regeneration Proposals and the Use Classes sought

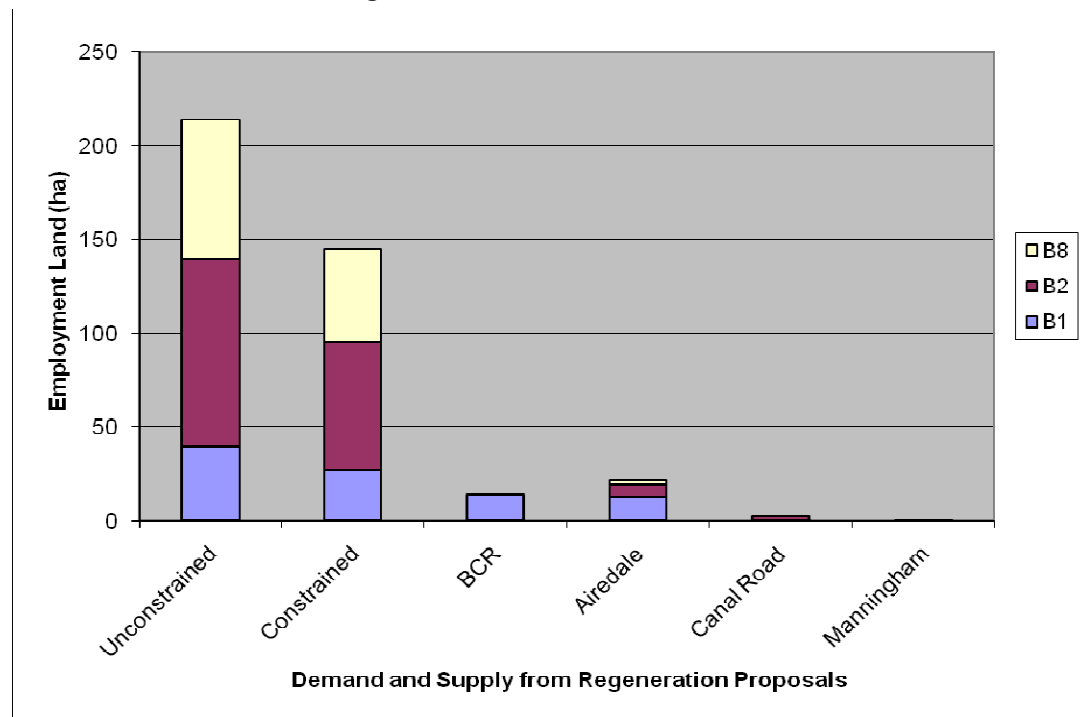


Figure 8.1 show that the regeneration proposals mainly seek land for office space. Therefore, the BCR and Airedale regeneration proposals could meet a proportion of the projected demand for office space in the district. It is also important to note that the regeneration proposals also show limited provision for manufacturing and distribution uses.

8.2.5 Review of RUDP supply of employment land

Section 5 provides a quantitative and qualitative review of the RUDP supply. The study has also appraised the quality and deliverability of the remaining supply. In broad quantitative terms, of the 159.13 ha that remain to be developed, it is recommended that:

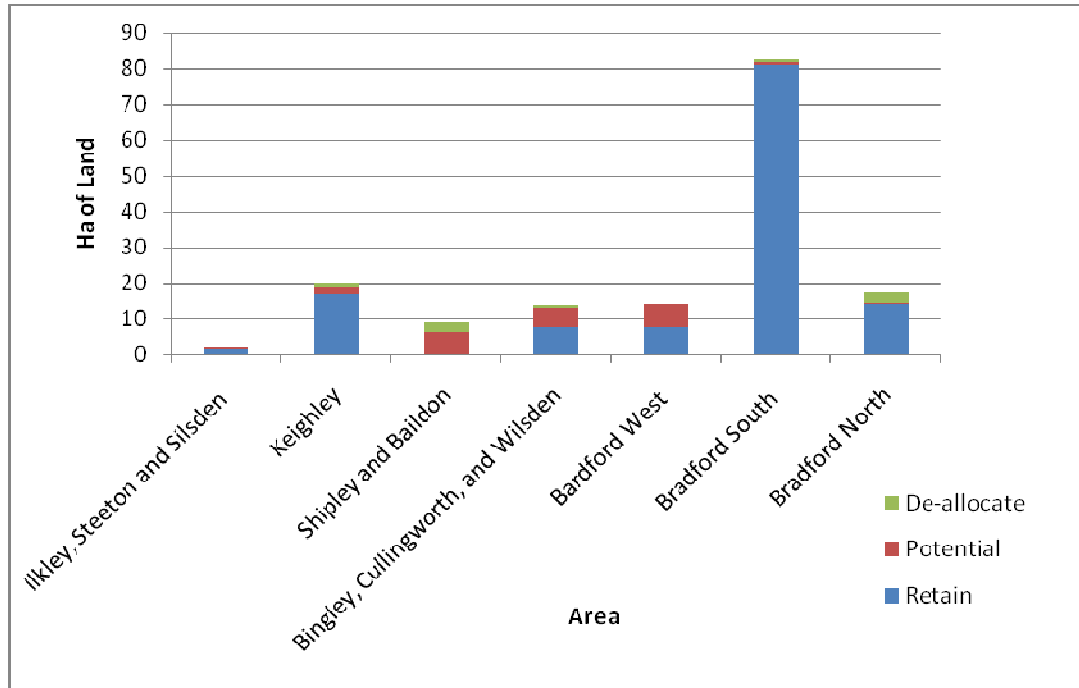
- 129.22 ha are retained as employment land;
- 22.32 ha could potentially be retained¹⁷; and

¹⁷ The employment land identified for potential retention allows for some flexibility in how this supply is managed. For example if the employment land to be potentially retained is located in an area where there is a perceived shortage of

- 7.59 ha are de-allocated.

In spatial terms this has differing implications per location. It is important to understand such spatial implications to again further understand how the projected demand can be met across the district.

Figure 8.2 Comparison of quality of RUDP allocated employment land supply in key areas of Bradford District



The analysis of RUDP allocated employment land supply shows the majority of the remaining sites are located in the Bradford South constituency. This is the location of the West Bowling site (36.8 ha) which slightly skews the supply figures in this constituency. In comparison to the size and role of the settlement, Shipley has a limited supply of employment land. The supply that is currently allocated is recommended for de-allocation as it is considered un-suitable for employment uses. The implications of this analysis for the settlements in the district are explored in the Recommended Settlement Strategy (see Section 8.3).

8.2.6 Comparison of projected demand, known likely take up and deliverable supply

In order to understand if further employment land is required in Bradford District it is necessary to understand what proportion of the projected demand can be met by the remaining RUDP supply, as of April 2006. This can derive from:

- RUDP allocated employment sites recommended for retention (not including the 36.38 ha West Bowling site) = 92.84ha;
- land already developed or under construction for employment generating uses from April 2006 to November 2007 = 19.44 ha;
- potential take up from the West Bowling site¹⁹ - this is considered to be for B8 use = 36.38 ha; and

employment land, then this could be retained for employment uses. In areas where there is a large supply of land then supply to be potentially retained could be released for other uses.

¹⁹ A planning application is currently under consideration for the development of the 36.38 ha site at West Bowling, South Bradford, for B8 uses. This report does not wish to prejudice the outcome of this application, but does convey the implications on demand if this site is taken up.

- additional land associated with regeneration proposals (Note: this will not take place on RUDP allocated sites so the study is confident there is no double counting) – this is considered to be mainly B1 use (see Figure 6.1) = 15.7 ha.

Analysis of land already taken up, the deliverable land supply and requirements of the district's regeneration schemes shows that there is a land supply of 164.36 ha²⁰.

A comparison of demand and the supply of employment land is set out in the box below.

Comparison of demand and supply of employment land

When comparing supply against demand from unconstrained growth the residual demand is:

Demand from Unconstrained Growth 214 ha minus Total Supply 164.36ha = a shortfall of **49.64 ha** of employment land.

Demand from Constrained Growth 145 ha minus Total Supply 164.36ha = a surplus of **19.36 ha** of employment land.

If BMDC plans for a more flexible supply in order to meet project demand from the unconstrained growth scenario, then a further 49.64 ha of land is required. Planning for a flexible supply is important as it allows for margin of choice, accommodates sites currently constrained but deliverable in the longer term, and allows for flexibility to respond to economic change. It should be noted the residual supply identified through the unconstrained growth scenario is very much dependent on the regeneration schemes being successfully delivered.

This section shows if BMDC plans for employment land to meet projected demand for the constrained growth scenario, there is currently an over supply of available land.

We have also sought to understand what this means for the different types of employment land, to provide a steer about the likely range of land required for each employment use class. Table 8.1 shows the B2 industrial and manufacturing use has the greatest demand for supply of employment land from RUDP allocated sites.

Table 8.1 Comparison of Supply and Demand for Use Classes

Use Class	Amount of supply, by use class, being brought forward through current development or regeneration projects	Residual Demand (demand that is yet to be met) from Constrained Growth and Unconstrained Growth Scenarios to be met by RUDP Allocated Supply and Other Sources	Total
B1a	15.7 ha windfall supply and recycling planned through regeneration proposals	11.3ha to 24.3ha	27 ha to 40 ha
B1b, B1c, and B2	19.4 ha land already developed or under construction	48.6 ha to 80.6 ha	68 ha to 100ha
B8	36.7 ha land available at West Bowling	13.6 ha to 37.62 ha	50 ha 74 ha

²⁰ This does not include the two small sites at Silsden, see section 5.2.1

8.3 Use of Potential Retention and Potential Reserve Supply To Meet Residual Demand from the unconstrained growth scenario

The analysis of supply and demand for employment land shows there that depending upon which employment growth scenario is chosen there is between a 19.36 ha surplus and 49.64 ha shortfall. We examined the suitability of the existing RUDP allocated sites and highlighted which are worthy of retention. This leaves a reserve of sites recommended for potential retention which Bradford District Council may wish to also retain for employment depending on the site's location.

In addition, we also examined the suitability of a wider reserve of sites largely drawn from sites de-allocated when the UDP was reviewed, or known windfalls, some of which depending on location may be worthy of forming the portfolio of LDF supply.

These can be used from a potential reserve of employment land and will enable BMDC to have an immediate, flexible supply of land but this should be balanced with the sustainability, market demand and settlement strategy for each location. It is likely the demand will originate from B2 industrial and manufacturing uses, therefore this study recommends the potential reserve supply is sourced from the Bradford urban area constituencies. Additional land should also be provided in the Bradford South constituency along the M606 to meet continued demand in this location.

B2 uses could also be accommodated via intensification of existing employment land. Proactive intervention is recommended in Section 8.4 for Bowling Back Lane in Bradford North and Dalton Lane in Keighley in order to release land to meet B2 demand.

8.4 Summary of Analysis of Supply and Demand

This section makes the following conclusions and recommendations based on analysis of supply and demand in Bradford District:

1. The supply of B1 office uses is dependent on the delivery of the City Centre and Airedale regeneration proposals in addition to the RUDP employment land allocation.
2. Residual demand from the unconstrained growth scenario is likely to be greatest for B2 uses and to a lesser extent B8 uses. This should be provided through RUDP allocated potential retention sites, RUDP de-allocated sites and additional employment land located in Bradford urban area, particularly in the North and South (M606) of Bradford. The study also recommends proactive intervention at Bowling Back Lane and Dalton Lane in Keighley to intensify B2 uses in these locations.
3. A significant supply of RUDP allocated employment land is located in the Airedale corridor. The recommended strategy to bring forward these sites is to prioritise development of sites in Bingley in the short term, followed by medium term development in Shipley and long term development in Keighley. The deliverability of employment land in Shipley and Keighley is dependent on proactive intervention.
4. The West Bowling site will provide for a significant part of the projected B8 demand.

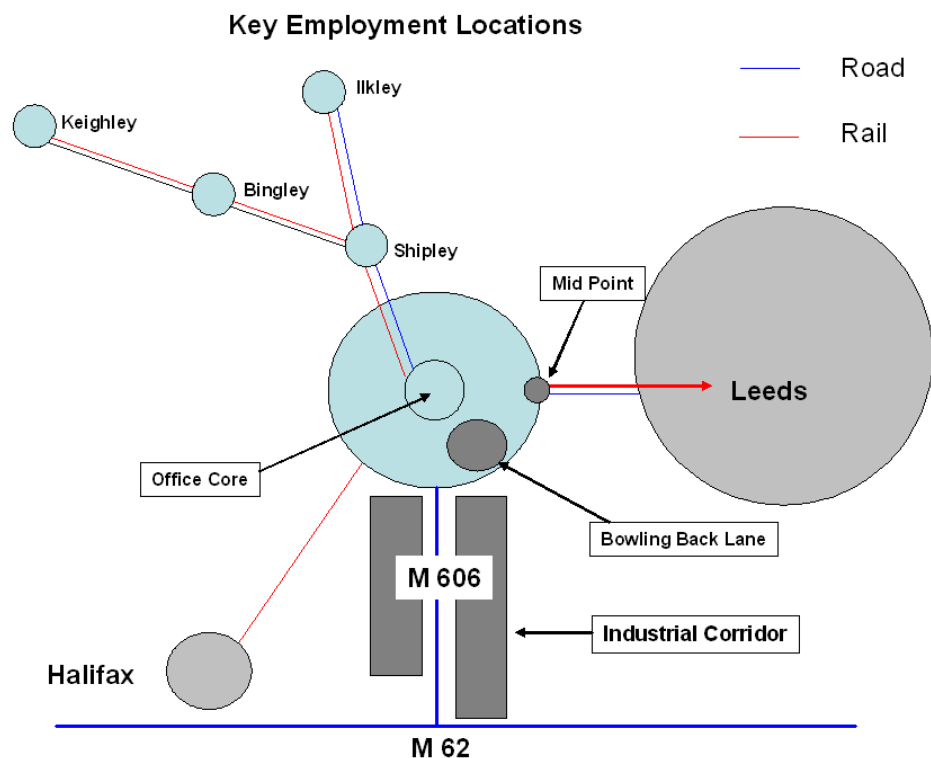
8.5 Settlement Strategy

8.5.1 Introduction

Figure 8.4 shows the key employment locations in Bradford District and the adjacent districts. It also shows the strategic locations for future employment. Recommendations regarding the role of these strategic locations and other key settlements in the district are also detailed in this section.

The map shows the relationship between the city of Bradford and the main employment corridors located along the M606, between Leeds and Bradford, along Airedale and Wharfedale. It also specifies the broad sectoral uses within these locations, such as industrial uses along the M606 and office use in the city centre.

Figure 8.4 Conceptual Map of Key Employment Locations



Source DTZ

8.5.2 Bradford

Bradford City Centre

The ability of the district to realise transformational change and support the demands of regional growth clusters is heavily dependent on the delivery of the City Centre Regeneration Proposals. The City Centre is a strategic location for quality higher density B1a office uses and if delivered will meet a significant proportion of the projected demand for B1a use.

In order for Bradford Centre Regeneration to adopt a flexible approach to the management of the City Centre regeneration it is recommended the LDF apply broad employment zones to the strategic office areas in The Bowl and The Valley. The LDF should also consider allocation of the Business Forest as a strategic employment site.

Bradford South (M606)

Bradford South, particularly the employment area around the M606 corridor is strategically important to the district. This area is performing well with the expansion of the Euroway

business park and the location of new B2 and B8 development. The Low Moor area is the location of one of the districts largest employment sites at West Bowling. Approval of the Prologis application would result in a significant proportion of the projected demand for B8 land being met by the West Bowling site.

While the majority of RUDP sites allocated recommended for retention are located in Bradford South, a lot of these sites are immediately available and could be taken up quickly. It is important for the LDF to ensure there is sufficient supply in this area to create pipeline supply and to maintain demand.

We recommend that the M606 corridor and surroundings should be considered for further provision of employment land for B2 and B8 uses. This corridor is a proven location for industrial and distributions sectors and should be expanded as a key location to meet projected B2 and B8 market demand. The LDF should not encourage development interests in B1 office space (unless ancillary to B2/B8 uses), as this should be directed towards sites in the City Centre or within Airedale.

Bradford West

Bradford West is the location for smaller, industrial sites distributed sporadically within the constituency. It is recommended this role is continued in order to meet localised market requirements for B2 and small scale B8 uses. However, this area of Bradford is not envisaged to play a significant role in the future and will mostly continue to serve local demands from the rural settlements.

Bradford North

The two areas in the Bradford North constituency likely to play a significant role in meeting future employment demand are Bowling Back Lane and the Canal Road Corridor.

Bowling Back Lane is a popular area for B2 employment uses seeking lower quality sites, however there is the opportunity to improve the performance of this area and intensify use to meet projected demand for B2 uses. Proactive interventions such as enforcement and area management are needed to intensify uses in this employment area. This should be combined with monitoring to understand changing requirements for B2 uses in terms of numbers of jobs and amount of land needed.

The Canal Road Corridor could play a role in meeting future demand for employment land in the district. The corridor is an important location as it links regeneration opportunities in Shipley and the City Centre. The Canal Masterplan seeks to allow for higher value employment uses in the canal corridor. Canal Road has also been included as part of the Leeds City Region Growth Points Expression of Interest. If successful this will seek to enable a significant number of residential dwellings in the corridor. All of these issues are to be investigated and reconciled in the Shipley and Canal Road Area Action Plan. This is a programmed AAP in the Bradford Local Development Scheme.

The site adjacent to Morrisons head quarters is a large strategic site and should be safeguarded for employment use. The site allocations DPD should look to retain this site for a use that complements the activities on the Morrisons site.

There are opportunities to release some of the smaller employment sites within the Bradford North area for residential or to encourage a mix of uses to include a proportion of employment. This study has assessed such sites to be 'potentially retained' for employment use and it is for CBMDC to determine if they wish to retain the site entirely within employment use or retain a proportion of it via mixed used development. Any potential de-allocation of sites in Bradford North should be carefully managed to ensure the retention of key sites for employment uses.

8.5.3 Airedale

Shipley, Saltaire and Esholt

ShIPLEY is considered as a location of strategic importance for the medium term as it is dependent on release of land as a result of regeneration activities. It has experienced some success from the developments taking place around Victoria Mills. There is the opportunity to realise further economic benefits offered by this scheme through recycling of low quality sites. The provision of quality employment sites in this area can be combined with additional land released if ShIPLEY Eastern Relief road is delivered.

Analysis shows ShIPLEY does not have a ready supply of allocated employment land. Therefore interventions in ShIPLEY will require configuration and land assembly of new sites along with resolution of land ownership issues. The focus in ShIPLEY should be to reposition the employment land portfolio to achieve a hub of economic activity. The study has identified opportunities around the digital sector and the location of the Advanced Digital Institute in ShIPLEY; however it is important growth in the digital sector complements activity taking place in Bingley Technology Park.

ShIPLEY provides an opportunity for the provision of future employment land but is dependent on the delivery of infrastructure schemes and interventions needed to bring sites forward. It is part of two regeneration areas (Canal Road Corridor and Airedale) which means it is likely to benefit from the market interest anticipated from the delivery of these regeneration schemes, particularly in the medium to long terms as evidence of change is visible.

Currently there is only a limited supply of employment land in ShIPLEY. However transport improvements currently under investigation may enhance the role and importance of some of these sites (such as the land at Dock Lane).

Esholt is located on the periphery of the district and is within the ShIPLEY catchment. It is necessary to consider this settlement within the employment land review as it is included in the Airedale masterplan. A brownfield site is likely to be released as a result of consolidation of public utilities operations but it is important to note that this land is within the Green Belt and would need to demonstrate exceptional circumstances. The study recommends that Esholt is considered for an exemplar sustainable R&D development directed to B1 b uses. This site could be offered as an alternative for developers interested in the site at Silsden.

Bingley

Bingley is positioned as the focus for research and development office facilities and the centre for digital media. Bingley is a popular location for business as demonstrated by the success of rental values and take-up at Aire Valley Business Park and modernisation of Castlefields Industrial Estate.

Bradford Council can take advantage of the range of sites available in Bingley that are deliverable in the short term. These can be marketed immediately and are suitable for B1 b, B1 c and B2 uses. Therefore, Bingley should be positioned as a strategic location to meet short term demand for employment land. Bingley's role needs to remain as part of a wider employment corridor within Airedale, wherein the readily developable sites within the settlement will ensure short-term employment growth but with significant long term growth elsewhere in Airedale.

The study recommends the LDF safeguards the sites in Bingley available for immediate supply, particularly those located around Coolgardie farm and along the A650 corridor to reduce the risk of competition from other uses. It is also important to have a co-ordinated approach to employment land provision along the Airedale Corridor in order to support complementary sectors such as the emerging digital and creative industries.

Keighley

Keighley's current role centres on provision of low quality employment sites with an industrial focus, particularly in the southern part of the settlement along the A629 corridor. In the north of the settlement along the A650 corridor the established business park at Beechcliffe performs well and is popular for B2 and B8 uses. There are also opportunities

from the Old Gas Works being developed for employment uses, particularly as we understand that the development of this site is to include a new road access directly from the A650.

Looking forward, Keighley is an important strategic location for the district. It is positioned regionally as a Principal Town and a second location for development after Bradford. Therefore, the study recommends that the allocated sites in Keighley identified for short term delivery should be safeguarded as strategic locations for development. Proactive intervention is needed to enable strategic sites to come forward, positioning Keighley as a location to meet longer term demand.

The study recommends considering the longer term strategy for Keighley in order to realise the opportunities offered by this location. The Airedale Masterplan sets out the high level ambitions for the town, however this study recommends producing an Area Action Plan to plan for policy and investment interventions in order to ensure an integrated approach is applied, reversing the current trends of ad hoc low quality employment development.

The majority of RUDP allocated sites recommended for retention in Keighley are identified as being deliverable in the medium to long term due to physical constraints such as access and contamination (particularly the site at Beechcliffe). Market demand in Keighley is also influenced by negative perceptions of the town as a location for business resulting from the environmental quality of the existing sites.

In order to deliver employment land in Keighley it is recommended the offer is re-defined to ensure quality development is brought forward, as the allocation of additional land on its own will not work to reverse current trends. It is recommended to adopt a strategy to take advantage of the opportunities for change in the employment zone along Dalton Lane (including the Dalton Mills development).

The study recognises the approach for Keighley should be carried out over the long term and has a number of challenges, however opportunities include considering land assembly options within the employment zone and focusing strategic investment to raise the quality of sites in this area. This should be combined with a strategy of enforcement, monitoring and effective management of existing employment sites. This would enable the Dalton Lane area to be brought forward to meet long term demand for B2 and small scale B8 uses.

The study recommends a strategy of managed decline for the employment sites located in the south of Keighley and a shift in focus to position the employment offer around the A650 and Dalton Lane area.

Steeton and Silsden

These settlements are facing continued pressure from developers to release greenfield land for housing and employment. Due to the peripheral location of these settlements within the district and their environmental context, there is political sensitivity around promoting these towns as significant locations for development.

The study recommends the LDF should support effective management of existing employment sites to encourage continued high quality B1c and B2 uses. The potential expansion land in Silsden located to the south of the business park is attractive and deliverable from a market perspective and has been popular for business starter units. New developments undertaken on the business park have been successful in letting / sale. However, this is a significant greenfield site and it is important any development complements the employment land offer in the strategic settlements of Bingley and Keighley located at the heart of the Airedale corridor. Such issues are to be weighed up as part of the consideration of this site for both employment and residential use in the preparation of the Site Allocations DPD.

8.5.4 Wharfedale

Ilkley and Burley in Wharfedale

Ilkley is a popular commuter settlement and faces competition from future demands for housing; however Ilkley should be positioned as a sustainable settlement to achieve a balance between the demand for housing land and provision of employment land. There is currently one RUDP allocated site located along the A65.

Analysis has highlighted that the resident population includes managers and owners of business located in Airedale. This has resulted in a strong relationship between Ilkley and Bingley, Steeton and Silsden. The study has identified future demand for local small business units to meet the requirements of entrepreneurs located in Wharfedale.

RUDP allocated employment sites should be retained at least in part for employment uses and focus on delivery of high quality, small to medium sized space, attractive to high value, fast growing firms. The study recommends LDF policy safeguards employment sites in Ilkley and directs uses to cater for innovation, entrepreneurship and new start-up space with small scale B1a and b uses. It suggests these employment sites could be developed through mixed use schemes to enable leverage from other uses to deliver high quality employment space.

8.5.5 Rural West Bradford

Howarth and Queensbury

The review recognises the role these small peripheral sites play in meeting local needs and supporting rural diversification. The study recommends their continued allocation as employment sites to support historic business uses.

8.6 Settlement Strategy Summary

Location	Summary	Recommendation
Bradford City Centre	Primary location for significant office development and will meet a significant proportion of the projected B1 office demand. This is dependent on delivery of the regeneration proposals.	Zoning of employment areas within the four regeneration areas and allocation of the Business Forest as a strategic employment area.
Bradford South	M606 corridor as a key location to meet projected B2 and B8 demand, however available land is in high demand which reduces the pipeline supply	Identification of additional land to accommodate expansion of the M606 corridor employment area. This may need to be greenfield land in close proximity
Bradford West	The allocated sites should continue to meet local market demand	No intervention needed.
Bradford North	Potential for employment sites along Canal Road Corridor to meet a range of employment uses Consolidation and intervention to ensure Bowling Back Lane is a quality location for B2 uses	Direct B2 uses to Bowling Back Lane and put in place management and enforcement interventions. Some demand can be met through intensification and better use of the existing sites, and recycling of outdated stock and premises. Evaluate Canal Road as a location for wider employment uses. Safeguard the RUDP allocated site adjacent to Morrisons head quarters.
Shipley	The release of sites to meet B1 and B2 demand is dependent on the delivery of interventions such as Shipley Eastern Relief Road	Identify potential sites that could come forward in the medium term if the Eastern Relief Road is implemented.
Bingley	Strategic sites available for immediate delivery will re-enforce Bingley's role as a centre for digital industry and R&D.	Safeguard the RUDP allocated sites recommended for retention and short term deliverability as sites for employment use.
Keighley	Focus on assembling sites around the A650 corridor and the Dalton Lane area to the north of Keighley. These sites are best suited for B2 and B8 uses. The remainder of the portfolio in Keighley should be assessed on a site by site basis.	Safeguard RUDP sites identified for delivery in the short term, particularly those located in north Keighley. Prepare an Area Action Plan and co-ordinate intervention to enable sites to come forward in Dalton Lane. Develop a long term strategy to unlock sites in Keighley and deliver change.
Steeton and Silsden	Manage and maintain the existing business parks which are performing well.	Large areas of land proposed for development in the draft RUDP were removed by the Inspector at Inquiry. Review these sites for potential use as part of the

Location	Summary	Recommendation
		preparation of the Site Allocations DPD.
Ilkley	Prioritise employment sites in Ilkley (including RUDP allocated and windfall sites) for use as small business and live/work units.	Safeguard the RUDP allocated site for employment uses and prioritise office / small business uses on this site. If change of use or redevelopment is sought for sites in existing employment use we recommend BMBC seek to retain a proportion of the site (or proposed floorspace) for employment uses. An appropriate proportion may be in the region of 50 - 60%.
Rural West Bradford	Existing sites support local needs and rural diversification.	No intervention needed but direct uses seeking significant space requirements to Airedale or Bradford urban area.

9 A Route To Achieving Change In Bradford District

9.1 Introduction

The delivery of a flexible, high quality supply of employment land in the right locations, as recommended in Section 8, needs to be supported by a number of policy and physical interventions to enable this to happen successfully. This section outlines some of the interventions required for both how the LDF tackles the implications of this report and how those managing the delivery of the district's regeneration proposals consider the implications of this report.

9.2 Recommended approach for the LDF

This study has identified a need for between 145 ha and 214ha of employment land, which takes into account the demands and requirements of the City Centre, Canal Road Corridor, Manningham and Airedale regeneration proposals.

The current RUDP allocated supply of employment land is distributed throughout the district and there are issues regarding deliverability of the remaining supply. This study recommends the retention of 129 ha of the current RUDP supply, of which 68% is deliverable in the short term.

The study has also identified the sectors which require additional land and provides a strong steer relating to the location of this land in order to meet market demand, regeneration objectives and align with the regional and emerging LDF settlement strategy for the district.

The analysis shows that if the LDF plans for a flexible supply of employment land then it needs to identify other sources of supply in addition to those recommended for retention from the RUDP allocated sites, and the windfall or recycling of existing land and sites planned for employment through the regeneration proposals.

The settlement strategy and market analysis review also highlights the need to manage a shift in the existing employment land portfolio. As a result, the study recommends the de-allocation of 7.59ha of land from the current RUDP portfolio. The majority of this from allocations located in and around Shipley.

The recommendation to plan for a flexible supply of land to allow for margin of choice, combined with the recommended de-allocation of employment land means the LDF will need to identify around 50 ha of new employment sites. This supply could either originate from RUDP allocated sites identified for potential retention, and the wider portfolio of sites examined as part of this study and identified as suitable for employment uses.

The challenge for the LDF is to locate this additional supply in locations to meet market demand in order to support economic growth in the district. The study has highlighted that demand for B1 office uses will be mainly accommodated on windfall land identified by regeneration proposals so will not need new land allocated. In any event B1a uses are less land hungry. The study has also highlighted the additional demand is likely to originate from B2 or B8 uses and more land is required to accommodate these uses.

In order to provide a flexible and varied supply the LDF will need to allocate a combination of large and smaller sites. The settlement strategy identifies the appropriate location for pipeline supply of larger sites is on Greenfield land located around the M606 corridor. This is in order to meet market demand for the provision of larger floorplates to support regionally significant B2 and B8 uses. The other location for the provision of smaller sites is Keighley. This will continue to support market demand for locally significant B2 and B8 uses requiring smaller floorplates.

The implications of this approach are managing the competing demand for uses around the M606 corridor. This requires the LDF to identify and safeguard new sites for future employment uses of strategic significance. This approach also requires significant intervention in Keighley with the LDF including a Keighley Area Action Plan to develop an

integrated approach to unlock and bring sites forward for development. In addition the LDF will need to manage the release of sites around Shipley and manage land assembly options to support the continued regeneration of Airedale corridor.

9.2.1 Monitoring Stock and Land Take Up

In order to add value to Bradford's existing monitoring system, it would be useful to track the take-up of employment sites by Use Class sector on an annual basis. This will enable the district to track changes in the economy based on demands from different Use Classes.

It is also important that any monitoring is assessed against revised REM data for full time employment forecasts in Bradford District. As Section 7 details, there are likely to be further additions to projected employment numbers as a result of the inclusion of migrant labour force data into the Experian model.

9.3 Implications for the District's Regeneration Schemes

9.3.1 Introduction

The availability of suitable, high quality sites to meet the requirements of the regions priority growth clusters is dependent on the delivery of the districts main regeneration schemes. The study highlights the importance of BCR and Airedale Partnership proposals in bringing forward supply of high quality office space in the City Centre and along the Airedale corridor.

Airedale and the city centre have different but complementary roles. The key priority is to re-position Bradford's economy by bringing forward a new city centre offer to enable Bradford to meet its potential as a key Regional City. It is important that what happens in Airedale fulfils a distinct role by focusing on the Digital Cluster and R&D activities, and should not impair the delivery of the city centre aspirations.

The interventions needed to ensure the successful delivery of these proposals are summarised below.

9.3.2 City Centre

The proposals for city centre regeneration and supply of office space are reliant on land assembly and resolution of land ownership issues. The LDF can support BCR by safeguarding and identifying suitable locations for employment use in the City Centre. In addition the LDF will need to adopt a sufficiently flexible approach to enable BCR to bring this land forward for other uses if required.

9.3.3 Canal Road Corridor (including Manningham)

The challenge for the Canal Road Corridor Area Action Plan is to resolve a number of competing interests and define a clear role for the regeneration area. The corridor is already the location of a successful number of businesses in Bradford and this employment role could be retained following the regeneration of the area. The Area Action Plan will need to consider what the appropriate mix of uses is in order to meet the varied interests from regional and local stakeholders.

9.3.4 Airedale

The recommended approach for Airedale is to phase and prioritise development, focusing on Bingley to deliver 'quick wins' and then prioritising interventions for Shipley and Keighley to deliver medium and long term change respectively. It is important to consider the relationship between these three settlements and manage Airedale as a whole. There is also the opportunity to build on the high level ambitions set out in the Airedale masterplan, through the preparation of specific Area Action Plans for Shipley and Keighley. This will inform the co-ordination and prioritisation of interventions to manage the shift in Shipley and Keighley's employment land portfolio.

Appendix A

**Office and Industrial
Market Analysis**

Appendix B

**Analysis of
Employment Land
Supply**

Appendix C

**Methodology For The
Quantitative Analysis
Of The REM**

C1 Method Used to Model Employment Land Projections

C1.1 Introduction

Economic projections are a tool for understanding how the roles of different economic sectors may change over time. The value of economic projections is derived from what they suggests may occur and how this is debated and acted upon.

From an employment land review perspective, the government guidance suggests applying a number of assumptions to projection models to understand what this may mean in terms of land requirements. This appendix provides further details of how we approached the technical aspects of the employment land review.

C1.2 Historic Trends Analysis

Data from two widely respected sources can be used in the historic trends analysis. In each case the data are provided or are converted into Employment (B) use classes and sub classes (or hereditaments). However, this is dependent on the format in which the source data is provided so assumptions and limitations are documented alongside each methodology.

Employment Land Monitoring Returns

Records of Bradford's annual average take up rates of employment land were examined with the data recorded as gross figure. These records represent a continuous flow of land that is allocated and being taken up for development. Based on the assumption that similar take up rates might be expected for the future, the local summations of the historic take up rates can be factored up to provide a forecast of the total amount of employment land likely to be required by the market in the period 2006-2021. The resultant figure represents the gross employment land forecast. It is important to note that this does not take into account any losses through redevelopment for other uses such as housing.

Commercial and Industrial Floorspace and Rateable Value Statistics

Commercial and Industrial Floorspace and Rateable Value Statistics are based on Valuation Office Agency data to produce statistics on floorspace and rateable values for non-domestic properties in England and Wales, and provides data on the total stock of floorspace, by office, industrial and warehousing type, down to MD level for the years 1998-2005. ODPM states in 'Commercial and Industrial Floorspace and Rateable Value Statistics 1998-2004 (2005)' that an approximation to the main groups of use classes may be taken directly from the bulk classes. That is:

- B1 – Offices
- B2 – Factories
- B8 – Warehouses

ODPM acknowledge that there are some weakness to this approach as many B1(b) and B1(c) hereditaments have been valued as factories as:

'Currently it is not possible to identify these with sufficient reliability to consider defining the B1 use class more precisely for the floorspace statistic...For some hereditaments this assignment of use classes is a rather uncertain process because it is not always clear from the data for a hereditament what it's use class should be, or because the premises combines activities from different use classes. Furthermore, there is a somewhat arbitrary distinction between some use classes, such as A2 and B1(a). It is not currently possible to separate B1(a), B1(b) and B1(c) in the VOA data'.

Consequently, care should be taken when directly comparing the VOA data with Employment Land Monitoring Returns and the quantitative projections based on the Yorkshire Futures Econometric Model data, as these other methodologies have incorporated B1b statistics with the B1 office data, rather than with the B1c and B2 data.

The floorspace statistics can be extrapolated up to 2021 scenarios, based on the average annual incremental increases between 1998 and 2004. As the area measurement conventions used for the Valuation Office Agency data differ slightly from those used in the quantitative assessment, it is necessary to convert net to gross floorspace (or vice versa). The ratios used are similar to those reported in English Partnerships Employment Densities: A Full Guide (2001), and the ODPM's Employment Land Reviews: Guidance Note. The robustness of these statistics is compromised somewhat by the short preceding time period upon which the trends are based (comparable data is only available for 1998-2004). The resultant employment land scenarios represent net change in employment land demand.

Given that the ODPM data are only based on seven survey years, this increases the potential for inaccurate projections at a fine-grain geographical level. This is because projections at a District level have the potential to reflect one-off developments or uncharacteristic trends which could have a significant impact on the subsequent projections

C1.3 Quantitative employment projections using the Regional Econometric Model

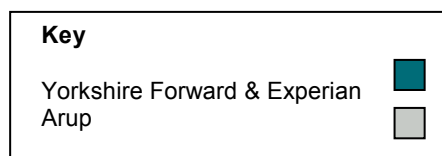
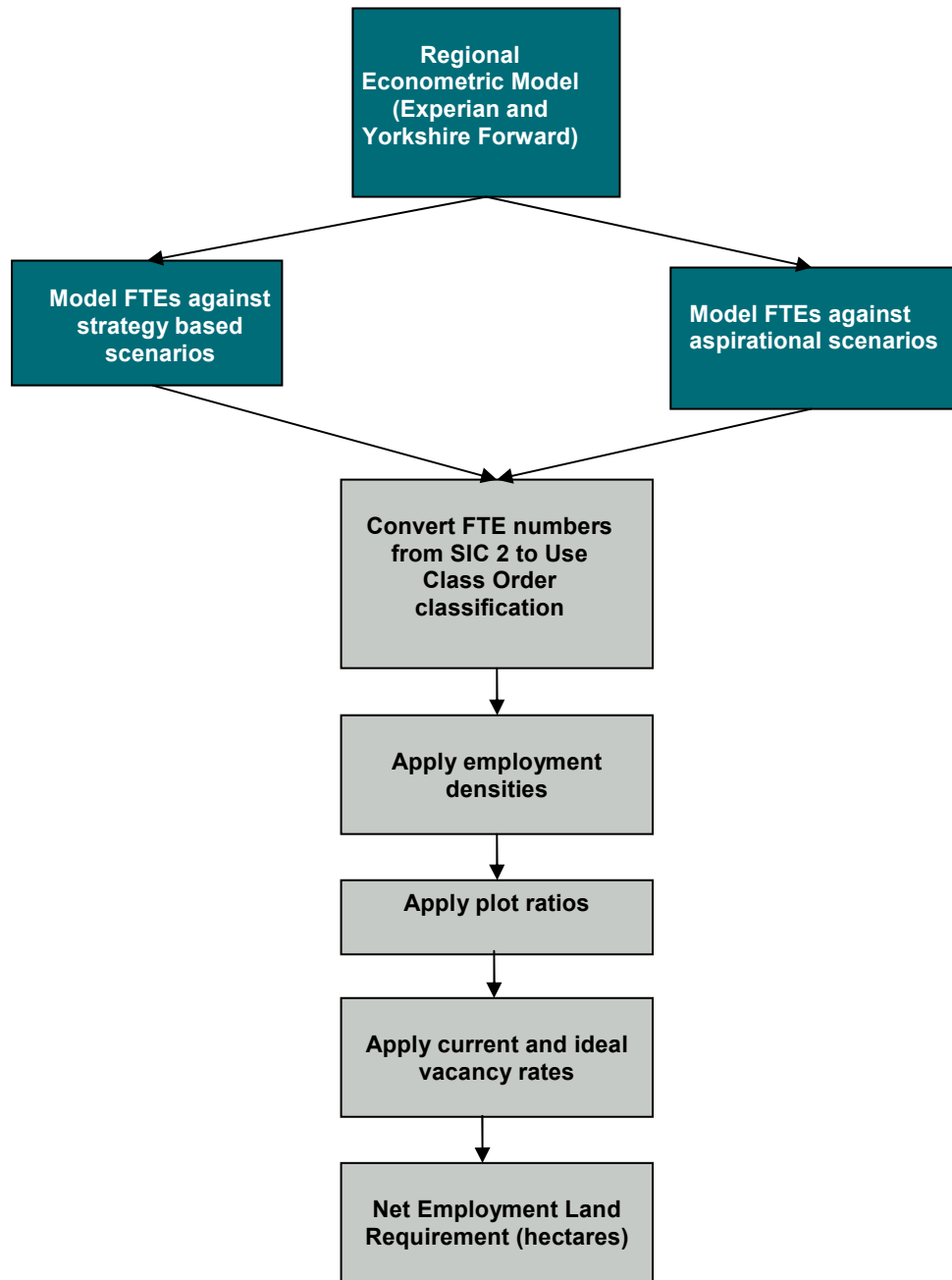
C1.3.1 Introduction

In the case of all economic projections models, their results are not really a prediction, nor really a forecast but a guide to how the future trajectory of the economy may look. The Regional Econometric Model (REM) is an industry growth model developed by Yorkshire Forward and Experian Business Strategies Ltd in 2001. It provides historic data and forecasts on 30 industry sectors between 1986 and 2016. Essentially this model works out historical relationships in economies makes assumptions about the future and then projects the relationships forward. So, while very sophisticated, it becomes less accurate the further forward the projection period and the smaller the locality being modelled.

Scenarios generated using REM have been used to inform the development of the Regional Spatial Strategy and the Regional Economic Strategy. It has also been used to inform the City Region Development Programmes for Leeds, Hull and the Humber and Sheffield City Regions.

The output of REM is in Full Time Equivalent Jobs (FTE) and it is updated bi-annually. This provides the opportunity to continually develop and improve the model. The econometric projections can be used to generate a number of scenarios. These scenarios can either be strategy based or scheme / aspiration led. Strategy based scenarios retain some links with what may be happening in the economy where as scheme or aspirational scenarios are developed to highlight what could be delivered and are therefore inherently reliant on the success of such schemes or projects. Aspirational scenarios have been developed to understand the implications of a range of regeneration and delivery schemes in the city.

Figure C1 Generating the employment land demand model using REM



C1.3.2 Yorkshire and Humber Regional Econometric Model Scenarios

The primary data source for the quantitative assessment is the Regional Econometric Model. This consists of an Access database using data on historical employment, output, productivity, population estimates and forecasts and other labour market information to test employment impact scenarios against a baseline dataset.

The Update of Job Growth and Employment Land Figures in the draft RSS for Yorkshire and Humber (following recommendations of the Examination in Public Panel Report) generated two additional scenarios to the strategy based scenarios used for the draft RSS.

The economic modelling that underpins this work uses the Regional Economic Model (2006) generated from the Experian Business Strategies Spring 2006-based regional forecasts. The two scenarios generated are:

- Scenario A (updated): Long Term Trend This reflects longer-term structural trends, and assumes that they will continue. Specifically, it assumes the relative performance seen over the last two decades will largely continue by sector. This scenario is the policy neutral, or base output of the regional econometric model.
- Unconstrained growth (Scenario D): This is based on Yorkshire Forwards City Region modelling work and factors in employment growth from over 250 transformational projects (with planning permission & approvals) across the region. Scenario D also assumes that existing activity on the ground will perform as planned. This option represents the best case as it assumes transformational growth will be realised. It does not factor discounting for regional labour market churn and sectoral displacement.

In addition to using the unconstrained growth scenario, Arup used further information from the Yorkshire Forward to model a constrained growth scenario. This was calculated as follows:

- Constrained growth scenario: This is based on Yorkshire Forwards City Region modelling work and includes employment growth from the transformational projects across the region. This option factors in a 32% adjustment to discount for regional labour market churn and sectoral displacement. The 32% adjustment is derived from the average adjustment applied by Yorkshire Forward for employment projections used for City Region modelling.

The unconstrained and constrained growth scenarios output an upper and lower level forecast data up to 2016 providing a range of parameters in which to understand Bradford districts employment forecasts and predicted employment land requirements. It should be noted that these are scenarios for regional economic prospects and as scenarios they should not be taken as predictors of what will happen.

C1.3.3 Translating the employment scenarios to land requirements

From an employment land review perspective, econometric models are a useful tool to understand what future land requirements might be. Assumptions can be applied to the projections to achieve a land requirement. There is no definitive set of assumptions and these are often based on best practice (particularly for plot ratios). There is a general view however, that such assumptions can help to 'localise' the econometric projections as they can be selected to align with the known position on the ground.

The employment projections produced by the Regional Econometric Model were translated into employment land scenarios for Bradford MDC through the application of employment densities, plot ratios and vacancy rates. The difference between the current and future employment land scenarios represents the net change of employment land that should be planned for over the plan period. A rough approximation of gross change can be calculated through an allowance for a margin of choice and leakage.

More specifically, translating employment projections into land requirements is primarily achieved by interpreting the Standard Industrial Classification (SIC) employment sectors into Use Classes (as defined by the Town and Country Planning [Use Classes] Order 2005), and then translating the employment figures up by factoring in employment density calculations.

This is by no means an exact science; there are very few detailed studies that have attempted a definitive split of SIC categories into the respective Use Classes, and there is little in the way of empirical evidence to support their resultant scenarios. There are inherent assumptions and limitations with this approach. For example, it does not reflect that job losses from a continuing business would not result in the release of land. Nonetheless,

this is the most robust existing method of translating employee numbers into employment land requirements and it provides useful evidence of employment trends.

Calculation of Employment by Industrial Sector:

The outputs of the REM were broken down for Bradford MDC by industrial sector, an approximation of the Standard Industrial Classifications Level 2 (using definitions based upon the 57 SIC2 division codes, aggregated down to from 30 distinct categories).

C1.3.4 Conversion of Industrial Sector to Use Class and Gross Employment Land Requirements

Steps A to E set out the method for how industrial sector data is converted into employment use classes and gross employment land requirements.

Step A Conversion of SIC2 to B1 Use Class

The following SIC2 industries were taken as an approximation of B1 (Business) Use Class, as recommended by the GLA in their 2002 study:

- i. Banking and Insurance;
- ii. Business Services;
- iii. Other Financial and Business Services.

Step B Conversion of SIC2 to B2 and B8 Use Classes

The methodology adopted by the East Midlands Study and the Greater London Authority's 2002 Studies, whereby B2 was taken to comprise of Manufacturing Industries alone, whilst B8 took the form of Wholesaling, was deemed too crude for the purposes of this assessment. Ideally, it would have been preferable to follow the exact methodology adopted by the GLA in their 2004 report on Industrial and Warehousing Land Demand in London; however, the REM produces scenarios based on an aggregate of the 57 SIC2 division codes to form 30 categories. These aggregations do not allow the level of specificity necessary to derive Industrial and Storage or Distribution sectoral matches (as specified by the GLA.)

Consequently, a separate assessment was made of the ABI 2004 base data, to determine the proportion of people employed in Bradford District for each industrial classification down to SIC Level 4. A judgement was then made as to the representation of each SIC4 class in the outputs of the Econometric Model. For example, in their 2004 report, the GLA recommended that the 'Post and Courier Activities' category should be included in the overall B8 Storage and Distribution figure, as it is generally warehouse based. However, at SIC2 level, it is included within the figure for 'Communications'.

A methodology has not been developed to date which is able to assign the SIC data accurately to the UCO hereditaments. Therefore it is difficult to separate with confidence B1a and B1b uses, and B1c and B2 uses

Step C Employment Densities

The following ratios were applied to the employment scenarios for Bradford District:

- Business/ Office: 19 square metres per worker (gross internal floorspace);
- Industrial: 34 square metres per worker (gross internal floorspace);
- Storage or Distribution: 50 square metres (gross external floorspace).

The employment densities quoted equate to the recommended densities in the English Partnerships guidance for 'general purpose built offices', 'general industrial buildings' and 'general warehousing' respectively. The figure for offices is broadly consistent with the ratios used in other comparable studies including the 2005 Yorkshire and Humber Assembly Employment Land Modelling work.

Step D Plot Ratios

It is usual to apply a standard plot ratio of 0.40 (or 40%) to the employment land scenarios for the office, industrial and storage or distribution uses. This assumes that a building occupies 40% of the total plot of employment land, with the rest given over to car parking, landscaping and other ancillary uses. Such an assumption accords with the figures referenced in the 2004 ODPM Guidance and also the figure used in the NWRA and East Midlands Studies for industrial and office based jobs, and is only slightly lower than the 0.45 central ratio figure used to calculate higher density industrial space in the GLA 2004 study.

However, this plot ratio should be used with caution; the Greater London Authority's 2002 study reports that office plot ratios in particular will vary widely, depending on the number of storeys and the extent of landscaping and car parking. 'Common observation indicates that high-density town centre offices can have plot ratios of 100% or more, while ratios in business parks are typically 25-30%'.

Therefore, the office plot ratios applied for Bradford District were calculated at 73% to reflect the increased focus on higher density city centre office development.

Step E Vacancy Rates

Existing Vacancy Rates:

As the scenarios for employment floorspace calculated via steps A to D take no account of vacant land, this has to be calculated separately. The ODPM's Commercial and Industrial Property Vacancy Statistics: England 2001/02 to 2003/04 was used to provide standard employment densities for Bradford District. The percentages relating to vacancy rates can be applied to the employee-based floorspace figures for 2006, to present a projection of the existing situation.

'Ideal' Vacancy Rates:

In order to calculate a future vacancy rate for the employment land scenarios, it is necessary to make certain assumptions regarding the 'ideal' future scenario Bradford District should be aspiring towards. There will always need to be a proportion of vacant land in order to allow for the smooth operation of the market. However, high B1 vacancy rates are undesirable in the long term, raising the question of whether we should be planning to provide new tracts of employment land if there is already a substantial amount of land that is lying under-utilised.

The Greater London Authority's 2004 study reported that although there was no rigorous measure of what a desirable level of vacant land should be, the current estimate of 15% in London could be reduced to 10% without adversely impacting on the industrial and warehousing sectors in the capital. The report states: 'The latter element is largely a matter of judgment, as no hard data are available to help estimate what a healthy vacancy rate would be. We do know, however, that this 'natural rate' depends on the turnaround time required for vacant or derelict industrial/warehousing sites to be redeveloped for a new generation of space. The longer the turnaround time, the higher the desirable vacancy rate and the less the amount available for release' (p.111).

Consequently, the study not only planned for a reduction in occupied land because of continuing industrial decline, but also for a fall in the existing total of vacant land to bring it in line with the minimum required for proper operation on the market.

The Hertfordshire Employment Land Study (2002) used an overall figure of 5% for B1, B2 and B8 land as a desirable target.

There are acknowledged limitations with using an jobs growth based econometric model to calculate employment land projections as some sectors of the economy may be growing in output terms and require land, but will not be jobs intensive and therefore not 'recognised' by the resultant land projection. This has been accommodated in the report by highlighting which sectors of the economy are projected to grow outside of those employment sectors classed within the Use Classes (as defined by the Town and Country Planning [Use Classes] Order 2005).

C1.3.5 Future updates to the Regional Econometric Model

Experian and Yorkshire Forward have recently issued 2007 base data for REM. For the first time the model factors in ABI data. REM still does not use ONS population data, but an update due in early 2008 is due to factor in migrancy data which will aid its robustness. It is understood from Yorkshire Forward that the inclusion of migrancy data in the REM will result in positive increases in FTE projections for Bradford District. Therefore, the report advises that the REM outputs are continually reviewed against the employment land projections as part of the monitoring process to ensure the jobs growth trends and employment land projections align.

Appendix D

**Site Assessment
Method**

D1 Site Assessment Approach and Criteria

D1.1 Introduction

This Appendix details our approach to the site assessment carried out as part of the employment land review process. CBMDC requested that the study examined the suitability of extant RUDP allocations and also a 'potential reserve supply' which included sites considered when drafting the RUDP (but did not get progressed as allocated sites) and known windfall sites.

The assessment was conducted over two stages. The first stage was a desktop assessment to identify which sites should be considered for a detailed site based review. The second stage involved Arup and DTZ visiting each site in Bradford district identified through the desktop assessment, and conducting a detailed assessment against the site assessment criteria detailed in Section D1.4 below.

The final results presented are a combination of both review stages.

D1.2 Initial Desktop Assessment

The initial desk top assessment was used to identify sites which may potentially perform well for employment uses and to help determine which sites warranted a more detailed assessment. The initial site assessment used a weighted appraisal system against the criteria highlighted below. However it is important to note that Arup and DTZ decided that on completion of the desktop assessment all sites should be examined in detail so the final

D1.3 Site Selection Categories

D1.3.1 Site Location

The site location and CBMDC reference were included within the exercise for ease of reference with the existing monitoring information and criteria provided by CBMDC. The sites were also categorised by settlement, which allows the worst and best performing sites to be analysed by location. The location categories also incorporated an assessment of whether the site is adjacent to the Green Belt, Area of Outstanding Natural Beauty or any other environmental designation using the UDP Proposals map.

Current land use has been assessed in terms of whether a site is Greenfield, Brownfield or an infill site. Brownfield land clearly being the most desirable and conversely Greenfield land being the least desirable.

D1.3.2 Flood Risk

Flood risk designations follow the Environment Agency flood risk maps and criteria, It was noted whether areas were within a low risk (EA Zone 3), medium risk (EA Zone 2) or high risk (EA Zone 1) of flooding.

D1.3.3 Relevant Planning History

This criteria relates to any planning history relating to the use of the site for employment generating uses, and seeks to analyse whether the site has any (recent) development interest for which permission has been granted, or whether an application is currently pending. It is split into three designations:

- Extant Consent;
- Expired Consent;
- Pending; and
- No History.

The data provided by CBMDC was cross referenced with the Council's Public Access Information to ensure a full history was provided.

D1.3.4 Site Access

This category looks at the road classification of the access to the site, using the Ordnance Survey Maps and aerial photographs to consider the most likely siting for the access. The designations follow the road classification hierarchy, with the higher classified roads providing better quality access and therefore likely to be more attractive for potential occupants:

- Class A road access;
- Class B road access; and
- Class C/Unclassified Road access.

D1.3.5 Transportation Links

This category consists of four sub-categories: Air, Rail, Bus and Road. Transport is an important indicator for attractiveness of a site, with existing transport links affecting both potential commuting to sites and delivery/shipping of goods.

The Air category relates to proximity to Leeds Bradford International Airport:

- 0-5 miles;
- 6-10 miles; and
- 11-20 miles.

Rail is related to the proximity of the site to an existing rail station and has a smaller radius as predominantly considers the potential for walking from the station to the site.

- A site is rated excellent if it is within a mile of an existing station,
- Good (within two miles) and
- Poor if over 2 miles from a station.

The bus category also uses similar criteria in relation to proximity to a bus station, rather than individual bus stops to reflect the potential for commuting by bus.

- Excellent = within half a mile
- Good = half a mile to a mile
- Poor = over a mile

The road category is assessed by proximity to an existing Major A-Road/Motorway Junction, and is assessed using existing maps and a consideration as to the ease of access to the A-Road from the site. It is again rated as excellent, good or poor utilising the same method as the other categories.

D1.3.6 Market and Viability

Four sub-categories have been utilised to provide an indicator of the marketability of a site: site size; availability; market significance; and marketability.

Size of site reflects the quantum of floorspace which could ultimately be delivered at each site.

- Greater than 40 acres;
- Greater than 20 acres;
- Greater than 10 acres;
- Greater than 5 acres; and
- Less than 5 acres.

Availability is categorised by short, medium and long term, with the availability of the site impacting on the marketability to potential tenants.

Market Significance reflects the significance of each site in terms of what could ultimately be delivered on the site and how this may relate to other existing or proposed provision in the immediate locality.

- Local;
- Regional;
- National.

Marketability provides an indication of each sites' ability to attract potential tenants / freehold owners (and thus provides an indication of likely end value).

- Class A, excellent;
- Class B, fair; and
- Class C, poor.

This assessment provides an overall view of the marketability of a site, as demonstrated by the larger sites with a greater market significance having a wider scope of potential occupants.

D1.3.7 Other Categories

The selection acknowledges if sites are located within the Bradford Centre Regeneration Area and Airedale Masterplan area, reflecting the impetus in developing these areas.

D1.4 Site Assessment Criteria

Initial indicators from the desktop analysis were used as a key tool in assessing the sites and their potential. The following criteria were taken from the desktop analysis and used to assess each site visited in Bradford District.

Site Reference

Cover – Indicative of how easily developable a site would be, any potential constraints

- Mature Screening
- Grassland
- Useable Buildings
- Derelict Buildings
- Vacant

Topography – Any natural constraints to development

- Predominantly Flat
- Slight Gradient (Unlikely to inhibit development)
- Steep Gradient (Likely to inhibit development/access)

Local Facilities – Whether any complimentary facilities which would enhance the attractiveness of the area for potential occupants/employees

- Retail/Restaurant
- Rail Station
- Bus Stops
- Public Parking
- Cycle Provision

Surrounding Area Condition

- Excellent
- Good
- Poor

Access Suitability – Potential for access and where most likely to be taken from

- Excellent
- Good
- Poor

Road Network

- Congested
- Free flowing

Surrounding Uses (Category for each N, E, S & W) – Used to inform type of employment uses which may be acceptable i.e. B1 only in primarily residential areas, B2/B8 in vicinity of other similar uses

- Residential Vacant
- Residential Occupied
- Business Office Vacant
- Business Office Occupied
- Business General Industrial Vacant
- Business General Industrial Occupied
- Business Storage Vacant
- Business Storage Occupied
- Retail Vacant
- Retail Occupied
- Open Countryside
- Road Frontage

Other Information

(DTZ) Qualitative site specific appraisal to give an overall view of the site

D1.5 Site Assessment Results

The results of the desktop and site assessment stages were aligned to form a final site assessment which provides a comprehensive review of every site.

A view was taken as to whether the sites would be available short, medium or long term for employment uses, with a gradation of the colouring utilised to show the availability i.e. the lighter colours indicating sites deliverability in the longer term. The gradation gives an indication as to the market readiness of the supply, with comments also supplied as to any potential issues which would need to be overcome as part of the development.

Sites were categorised into retain or re-allocate, potentially retain and deallocate/do not reallocate, using a traffic light system indicate the recommendation. Eg, retain = green, potentially retain = yellow/amber, deallocate = red.

BINGLEY,
CULLINGWORTH &
WILSDEN

Site Information					Environmental Issues										Accessibility					Site Assessment										Market View									
BMDC Ref	Site Address	Settlement	Size (Ha)	S/M/L Term	Regen Area	UDP Status	Planning History	Current Land Use	Adj. Green Belt	Location	Adj. AONB	Adj. Other Environmental Designation	Flood Risk	Site Access	Air	Rail	Bus	Road	Access Suitability	Road Network	Cover	Topography	Local Facilities	Surrounding Area Condition	Surrounding Uses North	Surrounding Uses East	Surrounding Uses South	Surrounding Uses West	Other Information	Market Significance	Marketability	DTZ Comments							
Allocated Supply																																							
E/SH02/0006/00	John Escritt Road, Bingley	Bingley	0.92	Short Term	Airedale	Allocated	None	Greenfield	N	Class C	N	Y	Low	Class C/Unclassifed	06-10	Excellent	Poor	Good																Local	Class C	The site forms a possible expansion of the employment provision already provided at John Escritt Road and should be retained as such. We would anticipate demand to come from local businesses in the medium to long term.			
E/SH02/0012/00	Bingley Auction Market	Bingley	1.76	Short Term	Airedale	Allocated	None	Brownfield	N	Class B	N	Y	Medium	Class A	06-10	Excellent	Poor	Excellent	Excellent	Free Flowing	Derelict Buildings	Predominantly Flat	Railway Station, Bus Stops;	Good	Residential Occupied;		Business General Industrial Occupied;	Road Frontage;	rail to east: not started but actively marketed: well performing site: castlefields/bingley tech park				Local	Class B	This site (or combination of sites) forms part of the Bingley Technology Park and provides an opportunity for the delivery of a substantial amount of accommodation over time in Bingley. Given the amount of accommodation which these sites could deliver and the proximity to good road and rail access we would expect demand at this location to be reasonably strong.				
E/SH02/0016/00	Coolgarde, Keighley Road		3.80	Short Term	Airedale	Allocated	Pending	Greenfield	N	Class B	N	N	Medium	Class A	06-10	Excellent	Poor	Excellent																					
E/SH20/0003/00	Land adj. The Airedale Route, Crossflats	Crossflats	1.05	Short Term	Airedale	Allocated	Expired Consent	Brownfield	N	Class B	N	N	High	Class A	06-10	Poor	Poor	Excellent																					
E/SH02/0004/00	Castlefields Lane, Crossflats	Crossflats	0.59	Medium Term Dependant on Access Issues		Allocated	Pending	Greenfield	N	Class B	N	N	Medium	Class C/Unclassifed	06-10	Good	Poor	Excellent	Poor	Free Flowing	Mature Screening	Predominantly Flat	Railway Station;	Good	Business General Industrial Occupied;	Business General Industrial Occupied;	Residential Occupied; Business General Industrial Occupied; Road Frontage;	Business General Industrial Occupied;	infill for castlefields - neighbouring niche industrial uses eg car restoration: partially forms parking area for neighbouring units			Local	Class B	Whilst this site is located close to the existing provision at Castlefields Ind Estate, there is no direct access from the existing estate with access currently only available along Castlefields Lane which is residential in nature. Should access be possible via Castlefields Industrial Estate this site should be retained although this requires further investigation.					
E/SH03/0003/00	Mannywells Quarry	Cullingworth	4.28	Medium Term		Allocated																													The existing industrial estate is very poor quality with a number of buildings being close to the end of their useful economic life and others in a poor state of repair. It is questionable whether more employment land is required at this location or whether local demand can be satisfied through recycling of existing land through the redevelopment / refurbishment of existing stock.				
E/SH03/0004/00	Mannywells Quarry, Mannywells Brow	Cullingworth	0.94	Medium Term		Allocated													Free Flowing	Usable Buildings	Slight Gradient (Unlikely to inhibit development)	Retail / Restaurant	Poor	Poor	Business General Industrial Occupied;	Business General Industrial Occupied;	Business General Industrial Occupied;	viaduct to north						The existing industrial estate is very poor quality with a number of buildings being close to the end of their useful economic life and others in a poor state of repair. It is questionable whether more employment land is required at this location or whether local demand can be satisfied through recycling of existing land through the redevelopment / refurbishment of existing stock.					
E/SH03/0005/00	Main Street, Lingbop	Wilsden	0.62	Long Term														Excellent	Free	Usable	Predominantly	Retail /	Excellent	Residential		Road	Residential	care home to east						This site consists of an open scrub land site adjacent to an old mill building currently					
Potential Reserve (source: sites deallocated through UDP review process and windfalls)																																							
E/SH02/0003/00	Land South of Farncliffe Road		0.94	Long Term for Employment Use		Deallocated	Expired Consent	Greenfield	N	Class C	N	Y	Low	Class C/Unclassifed	06-10	Excellent	Poor	Excellent																		Site recommended for deallocation	Local	Class C	

Total UDP supply in Bingley (ha)	13.96
Retain (Green) ST	7.53
Retain (Green) MT	0
Retain (Green) LT	0
Potential (Yellow) MT	5.81
Deallocate (Red) LT	0.62
Potential Reserve (ha)	0.94
Retain (Green)	0
Potential (Yellow)	0
Deallocate (Red)	0.94

SHIPLEY & BALDON

Site Information				Environmental Issues										Accessibility						Site Assessment								Market View					
BMDC Ref	Site Address	Size (Ha)	S/M/L Term	Regen Area	UDP Status	Planning History	Current Land Use	Adj. Green Belt	Location	Adj. AONB	Adj. Other Environmental Designation	Flood Risk	Site Access	Air	Rail	Bus	Road	Access Suitability	Road Network	Cover	Topography	Local Facilities	Surrounding Area Condition	Surrounding Uses North	Surrounding Uses East	Surrounding Uses South	Surrounding Uses West	Other Information	Market Significance	Marketability	DTZ Comments		
Allocated Supply																																	
ESH01/0002/00	Otley Road, Hollins Hill	1.84	Medium Term - Constrained by River and Flood Risk Issues		Allocated	None	Greenfield	Y	Class C	N	N	Medium	Class A	0-5	Poor	Poor	Excellent	Good	Free Flowing	Vacant	Predominantly Flat	Bus Stops;	Poor	Business General Industrial Vacant; Business General Industrial Occupied;	Open Countryside;	Road Frontage;	Open Countryside;	infill to front of existing ind estate - poor condition - for other use would need to consider wider redev.	Local	Class C	The majority of the site is taken up currently by either trees or the river (which runs north south through the site). One part of the site also appears to be in use as a car park / service yard for the existing occupier(s). The area which appears to be incapable of development (ie. that which is west of the river and hence divorced from the remainder of the industrial estate) should be de-allocated.		
ESH01/0004/00	Buck Lane, Otley Road	6.31	Medium Term Employment - Consider Resi led Mixed Use Scheme		Allocated	None	Greenfield	Y	Class C	N	Y	Medium	Class A	0-5	Poor	Poor	Excellent	Good	Free Flowing	Grassland (Unlikely to inhibit development)	Slight Gradient (Unlikely to inhibit development)	Retail / Restaurant; Bus Stops;	Excellent	Road Frontage;	Open Countryside;	Business General Industrial Occupied; Open Countryside;	Road Frontage;	extn to existing ind area - greenfield site - flood risk to east -	Local	Class C	This site is located on Otley Road although is set down from the roadside. It is questionable whether there is demand for further employment provision at this location although there may be some scope for a limited amount of the land to be retained as expansion / ancillary to the large adjacent works. It is considered that this site should be de-allocated in part to provide additional housing land.		
ESH21/0009/00	Land between Railway Line and Leeds-Liverpool Canal, Dockfield Rd, Dockfield Lane	0.98	Long Term - Consider deallocation for resi along with adjoining site	Airedale	Allocated	Expired Consent	Greenfield	N	Class C	N	Y	High	Class C/Unclassified	0-5	Excellent	Poor	Poor	Poor	Free Flowing	Mature Screening	Predominantly Flat	Retail / Restaurant; Railway Station;	Good	Business General Industrial Occupied;		Business General Industrial Occupied;	rail to south river to north - currently part car park for unit to west - occupied but advertised for sale - no separate access - access via swing bridge restricting vehicle size	Local	Class C	This site is only accessed via the existing single unit to the west (which is currently being marketed) and is otherwise bounded by the railway line and the canal. Access to the site is only possible via a low weight limit bridge or underneath a railway bridge both of which is considered to be poor in terms of accessing an employment site. The site adjacent to the existing unit has recently been redeveloped to high quality residential flats and we would recommend the deallocation of this site for similar use.			
Potential Reserve (source: sites deallocated through UDP review process and windfalls)																																	
ESH01/0006/00	Various Sites	0.4	Short Term	Airedale	Deallocated																												This site is adjacent to a number of existing employment uses and should be retained for employment development. Given the existing office uses in these premises we would anticipate demand to be reasonably good in this location although we understand this site may have been on the market for some time.
ESH21/0013/00	Brighton Street	0.26	Short Term	Airedale	Deallocated	None	Brownfield	N	Class C	N	N	High	Class C/Unclassified	0-5	Excellent	Poor	Excellent																The adjacent mill building has recently been converted to residential use and part of this site has been built out as a multi-storey car park to serve the residential. The remainder of this site is small and given the changing nature of its surroundings is not considered to be an appropriate location for employment development and the site should be deallocated.

Total UDP supply in Shipley (ha)	9.13
Retain (Green) ST	0
Retain (Green) MT	0
Retain (Green) LT	0
Potential (Yellow) MT	6.31
Deallocate (Red) MT	1.84
Deallocate (Red) LT	0.98
Potential Reserve (ha)	0.66
Retain (Green)	0.4
Potential (Yellow)	0
Deallocate (Red)	0.26

BRADFORD SOUTH
CONSTITUENCY

BMDC Ref	Site Address	Site Information				Environmental Issues							Accessibility							Site Assessment							Market View						
		Settlement	Size (Ha)	S/M/L Term	Regen Area	UDP Status	Planning History	Current Land Use	Adj. Green Belt	Location	Adj. AONB	Adj. Other Environmental Designation	Flood Risk	Site Access	Air	Rail	Bus	Road	Access Suitability	Road Network	Cover	Topography	Local Facilities	Surrounding Area Condition	Surrounding Uses North	Surrounding Uses East	Surrounding Uses South	Surrounding Uses West	Other Information	Market Significance	Marketability	DTZ Comments	
Allocated Supply																																	
EBS10000400	Clayton Rd	Great Horton	2.31	Short Term	N/A	Allocated	Extant consent	Greenfield	Y	Class C	N	Y	Low	Class C/Unclassified	06-10	Poor	Good	Good	Good	Free Flowing	Grassland	Predominantly Flat	Bus Stops	Good	Residential Occupied	Residential Occupied	Business General Industrial Occupied	Business General Industrial Occupied	car park and football pitch for industrial firm not likely to come forward quickly	Local	Class C	This site is likely to form expansion land for the large existing Field Packaging site (or the business park to the rear) and should be retained as such. Demand for this site is likely to be entirely linked to the expansion plans of Field Packaging.	
EBS10000500	Northside Road, Lidget Green	Great Horton	0.47	Short Term	N/A	Allocated	Extant consent	Infill	N	Class C	N	N	Low	Class C/Unclassified	06-10	Poor	Good	Excellent	Good	Free Flowing	Grassland	Predominantly Flat	Retail / Restaurant Bus Stops	Poor	Road Frontage	Business General Industrial Occupied	Business General Industrial Occupied	road frontage	Local	Class C	The site forms expansion land to the existing industrial provision located on the south side of North Lidget Road. Because of the shape of the site and location, demand is likely to be relatively slow as a standalone development plot although take up as part of an expansion of existing uses is possible.		
EBS25001500	Euroway Trading Estate	Bierley	0.62	Short Term, expansion site	N/A	Allocated	Extant consent	Greenfield	Y	Class A	N	Y	Low	Class C/Unclassified	06-10	Poor	Good	Excellent	Good	Free Flowing	Grassland	Predominantly Flat	Bus Stops	Good	Road Frontage	Business General Industrial Occupied	Business General Industrial Occupied	no access to site - behind existing locked unit	Regional	Class A	This site represents the expansion land to an existing unit at Euroway Trading Estate and should be retained as such. Demand for this site entirely depends upon the expansion plans of the existing occupier.		
EBS25001900	West Bowling Golf Course	West Bowling	36.68	Short Term	N/A	Allocated	Pending	Brownfield	Y	Class A	N	Y	Low	Class A	06-10	Poor	Good	Excellent	Excellent	Free Flowing	Grassland	Steep Gradient (Likely to inhibit development / access)	Retail / Restaurant Bus Stops	Excellent	Road Frontage	Open Countryside	Business General Industrial Occupied	Road Frontage	m006 to west	National	Class A	This site is located immediately adjacent to the M06 and is currently the subject of a planning application from Prologis to deliver a circa 3,000,000 sq. ft. distribution unit.	
EBS25002400	Kaycell Street/Burnham Ave	Bierley	2.83	Short Term	N/A	Allocated	None	Infill	N	Class B	N	N	Low	Class A	06-10	Poor	Good	Excellent	Good	Free Flowing	Grassland	Steep Gradient (Likely to inhibit development / access)	Retail / Restaurant Bus Stops	Good	Business General Industrial Occupied	Residential Occupied	Road Frontage	Residential Occupied	stand alone site or exist of existing uses	Local	Class B	The site is located adjacent to the McFarland unit on Rock Lane and whilst perhaps slightly awkward in shape it is located in very close proximity to the M06 and could be used as expansion land to the existing provision on site or for the delivery of smaller units leading directly to its Burnham Avenue and beyond to the national road network. There is some evidence of new build / future build housing directly south on Burnham Avenue and any development undertaken on the site should be sympathetic to this. Given the proximity to the M06 we would anticipate demand to be relatively good.	
EBS20000300	Royds Hall Lane, Woodside	Butershaw	4.65	Short to Medium Term	N/A	Allocated	Expired Consent	Greenfield	Y	Class C	N	N	Low	Class C/Unclassified	06-10	Poor	Poor	Excellent	Good	Free Flowing	Grassland	Predominantly Flat	Bus Stops	Good	Business General Industrial Occupied	Business General Industrial Occupied		Local	Class C	This site is adjacent to large Bulmer & Lamb and Yorkshire Water sites and should be retained as expansion land to either of these operations.			
EBS20001100	New Works Road	Low Moor, Bradford	0.72	Short Term	N/A	Allocated	None	Brownfield	Y	Class B	Y	Y	Low	Class C/Unclassified	06-10	Poor	Poor	Good	Good	Free Flowing	Grassland	Predominantly Flat	Bus Stops	Good	Business General Industrial Occupied	Business General Industrial Occupied		Local	Class B	This site acts as a gateway site to the industrial sites located along New Works Road and should be retained for employment use. We would anticipate that demand is most likely to come from local businesses and that the site is likely to be taken up in the medium to long term.			
EBS20001600	Stanhope Lane, South	Bradford	3.87	Short Term	N/A	Allocated	None	Greenfield	Y	Class A	N	N	Low	Class C/Unclassified	06-10	Poor	Poor	Excellent	Good	Free Flowing	Grassland	Predominantly Flat	Bus Stops	Good	Business General Industrial Occupied	Business General Industrial Occupied		Regional	Class A				
EBS25000200	Cross Lane		11.46	Short Term	N/A	Allocated																										This site forms the natural expansion of the existing provision at this location and should be retained as such. The existing provision appears to have been relatively successful and we would anticipate that further development of a similar quality would be equally as popular to the occupier market.	
EBS10001000	Lighey Road, Grogan	Hemsworth, Bradford	3.25	Medium Term	N/A	Allocated	Expired Consent	Greenfield	N	Class B	N	N	High	Class A	06-10	Poor	Good	Excellent	Good	Free Flowing	Grassland	Predominantly Flat	Bus Stops	Good	Business General Industrial Occupied	Business General Industrial Occupied		Local	Class C	This site is located on the level of Bradford in an area dominated by employment uses. Should the site be capable of access from Lighey Road it is foreseeable that it could be developed for employment uses in the future. Demand for this site hinges on access arrangements although should this be achievable we would anticipate demand to be reasonable.			
EBS25000500	Euroway Trading Estate	Bierley	1.90	Medium Term, topography issues and remediation/clear-up of site required	N/A	Allocated	Expired Consent	Greenfield	Y	Class A	N	N	Low	Class C/Unclassified	06-10	Poor	Poor	Excellent	Good	Free Flowing	Grassland	Slight Gradient (Likely to inhibit development)	Bus Stops	Good	Open Countryside	Open Countryside	Business Office	Business General Industrial Occupied	site has been used to dump scrapings and concrete slabs - need to be removed before development for existing industrial estate	Regional	Class A	This site appears to have some topographical issues which may restrict delivery although given its location along the M06 corridor should be retained and further work undertaken to assess viability. Assuming delivery is possible / viable, we would anticipate demand to be good given its location along the M06 corridor.	
EBS25000100	Cross Lane	Tong	1.69	Medium to Long Term	N/A	Allocated											Excellent	Free Flowing	Grassland	Predominantly Flat	Retail / Restaurant Bus Stops	Good	Road Frontage	Business General Industrial Occupied	Business General Industrial Occupied	open to existing industrial park				This site is the expansion land to the existing business park and adjoining bakery site and should be retained as such. The business park appears to be relatively successful although we would expect the sites around the more established Cross Lane to be taken up before this site (which essentially is divorced from the business park as it has no road access through).			
EBS25001700	Tong Street	Bradford	0.90	Medium to Long Term	N/A	Allocated											Poor	Free Flowing	Vacant	Predominantly Flat	Bus Stops	Poor	Business General Industrial Occupied	Business General Industrial Occupied	Business General Industrial Occupied	Road Frontage				The shape of this site precludes any development of any quantum of housing however should be retained as it is located between several employment sites and the land is most likely to be taken up over time as expansion / extensions to existing buildings. Demand will be determined by individual occupier's expansion plans.			
EBS20000200	At Marks Works, Wyke Lane	Wyke	5.42	Medium Term	N/A	Allocated											Poor	Free Flowing	Grassland	Slight Gradient (Likely to inhibit development)	Bus Stops	Good	Open Countryside	Open Countryside	Open Countryside	Business General Industrial Occupied	Business General Industrial Occupied	no existing chemical works only suitable as open site				This site forms potential expansion land for the At Marks Engineering works and should be retained as such.	
EBS20000500	Euroway Trading Estate	Bierley	1.46	Medium Term	N/A	Allocated											Good	Free Flowing	Grassland	Steep Gradient (Likely to inhibit development / access)	Bus Stops	Good	Road Frontage	Road Frontage	Business General Industrial Occupied	Road Frontage					This is a small site located on the M06 corridor. Further work should be done to assess the viability of delivering accommodation given the identified topographical issues here. Assuming delivery is possible / viable we would anticipate demand to be good.		
EBS20000900	Station Mills, Station Road	Wyke	0.63	Medium Term	N/A	Allocated											Good	Free Flowing	Nature Screening	Predominantly Flat	Bus Stops	Good	Road Frontage	Open Countryside	Open Countryside	Business General Industrial Occupied	Business General Industrial Occupied	adjacent to new residential development, shares access with existing units				This site should be retained as expansion land / with development for the existing industrial estate located here. We would anticipate demand to be from local businesses and in the medium to long term.	
EBS20000800	Low Moor	Wyke	0.69	Medium Term	N/A	Allocated											Good	Free Flowing	Nature Screening	Predominantly Flat	Bus Stops	Good	Road Frontage	Open Countryside	Open Countryside	Business General Industrial Occupied	Business General Industrial Occupied	car park for current adjoining unit - land rises steeply to south and east - may cause problem in the future				This site is adjacent to a number of existing employment units and should be retained as expansion land or for with development.	
EBS20001000	Spanner Road	Low Moor, Bradford	1.00	Medium Term, fill site	N/A	Allocated	Extant consent	Greenfield	N	Class B	N	N	Low	Class C/Unclassified	06-10	Poor	Good	Good	Free Flowing	Grassland	Predominantly Flat	Bus Stops	Good	Business General Industrial Occupied	Business General Industrial Occupied		Local	Class C	This site contains a number of existing buildings in an established industrial location and we would consider that the remainder of the site will be taken up as with over time.				
EBS19000100	Black Dyke Mills, Brighouse Road	Queensbury	2.39	Long Term	N/A	Allocated											Good	Free Flowing	Grassland	Predominantly Flat	Bus Stops	Good	Business General Industrial Occupied	Business General Industrial Occupied	Road Frontage	Residential Occupied	Open Countryside					The site forms potential expansion of the southern buildings forming part of the Black Dyke Mills complex. Part of the site is most suitable as expansion to the existing buildings although some new development could be delivered at the southern end of the site. The site is accessed through the complex and subsequently has limited profile. Given this (and the general location of site within the district) we would therefore expect demand to be limited.	
EBS10000700	Beckside Rd	Great Horton	0.82	Medium Term - Need for Major Redevelopment	N/A	Allocated	Expired Consent	Brownfield	N	Class C	N	Y	Low	Class C/Unclassified	06-10	Poor	Good	Excellent	Poor	Free Flowing	Derelict Buildings	Steep Gradient (Likely to inhibit development / access)	Bus Stops	Poor	Business General Industrial Occupied	Business General Industrial Occupied	Road Frontage	Business General Industrial Occupied	Business General Industrial Occupied	currently used as limeric depot - poor site would have to consider levels on which dev could proceed	Local	Class C	The site currently has poor access (being a single lane track from the east) which is unsuitable for modern requirements. Without this access the site is effectively landlocked. Several buildings to the north east of the site are in poor condition and approaching the end of their useful economic life. Without significant demolition / reconfiguration of the site, it is unlikely that any development could be delivered apart from extensions to existing buildings. There may be issues regarding land ownership which may prevent access being created from Brackenbeck Road, although this should be explored further.
EBS25000300	Home Wood	Tong	0.49	Long Term - Within Residential Area, poor access	N/A	Allocated											Poor	Free Flowing	Predominantly Flat	Retail / Restaurant Bus Stops	Poor	Residential Occupied	Residential Occupied	Road Frontage	Business General Industrial Occupied	Business General Industrial Occupied	bad access from main road - infill land and prospect mill dev would need to consider impact on rest to east at lower level				This site is open scrub land / surface car parking for a mill building. Access to the site is only possible via residential streets and the surrounding properties are residential in nature. This site should be deallocated and allocated for housing development.		
Potential Reserve (source: sites deallocated through UDP review process and windfalls)																																	
EBS19000200	Portal Works, Brighouse/Derham Rd	Queensbury	0.97	Long Term	N/A	Deallocated																										This site is located in an area which has been a number of existing employment uses. The reality appears to be that the site is unlikely to be developed given the poor access and the fact that the site is currently used as a car park. The site should be deallocated and allocated for housing development.	

Total UDP supply in Bradford	82.39
South (ha)	
Retain (Green) ST	62.01
Retain (Green) MFT	16.00
Retain (Green) LT	2.28
Potential (Yellow)	0.03
Deallocate (Red)	0.49
Potential Reserve (ha)	2.47
Retain (Green)	1.7
Potential (Yellow)	0.4
Deallocate (Red)	0.37

BRADFORD WEST
CONSTITUENCY

BMDC Ref	Site Address	Settlement	Site Information			Regen Area	UDP Status	Planning History	Current Land Use	Environmental Issues					Accessibility					Site Assessment							Market View							
			Size (Ha)	S/M/L Term						Adj. Green Belt	Location	Adj. AONB	Adj. Other Environmental Designation	Flood Risk	Site Access	Air	Rail	Bus	Road	Access Suitability	Road Network	Cover	Topography	Local Facilities	Surrounding Area Condition	Surrounding Uses North	Surrounding Uses East	Surrounding Uses South	Surrounding Uses West	Other Information	Market Significance	Marketability	DTZ Comments	
Allocated Supply																																		
E/BW/27/0028/00	Land at Corner of Brownroyd Street and Legrams Lane	Bradford	0.54	Short Term		Allocated	None	Greenfield	N	Class C	N	N	Low	Class C/Unclassified	06-10	Good	Good	Excellent														Local	Class C	The site is located at the frontage to the Federal Mogul plant which is located to the north. The site is served by a central access road which allows the development of this site. We would anticipate demand at this location would be reasonable although this section of the site is smaller than that to the east and this would of course restrict the type of units deliverable.
E/BW/17/0008/00	Ripley Street/Boling Road	West Bowling, Bradford	2.22	Short Term		Allocated	Extant consent	Brownfield	N	Class B	N	N	Low	Class C/Unclassified	06-10	Excellent	Excellent	Excellent														Local	Class B	This site is the identified Bradford Food Technology Park site. We understand that the site is to include a mix of large and small units but will also include some incubator units for food manufacturing companies. We would anticipate the clustering of specialist uses in this one single location to attract a reasonably strong level of demand.
E/BW/17/0009/00	Ripley Road	East Bowling	0.82	Short to Medium Term		Allocated	None	Infill	N	Class B	N	N	Low	Class C/Unclassified	06-10	Good	Excellent	Good														Local	Class C	The site is currently set out as car parking / yard / open storage for the vacant factory building located immediately to the north. This site should be retained as expansion land or as a standalone development plot. There is evidence of new build units in close proximity which have been let and it is considered that demand at this site would be reasonable given it has slightly less profile.
E/BW/27/0008/00	Land North of Legrams Lane, Manningham	Bradford	0.94	Short Term		Allocated	Expired Consent	Greenfield	N	Class C	N	N	Low	Class C/Unclassified	06-10	Good	Good	Good	Good	Congested	Grassland	Predominantly Flat	Retail / Restaurant / Bus Stops	Poor	Business General Industrial Occupied	Business General Industrial Occupied	Road Frontage	Road Frontage	Independent site or extn	Local	Class C	The site is located at the frontage to the Federal Mogul plant which is located to the north. The site is served by a central access road which allows the development of this site. We would anticipate demand at this location would be reasonable although the site does already have a board on it stating that it is to be developed as a food production facility for an Indian food company.		
E/BW/27/0018/00	Land at corner of Brownroyd Street and Princeville Road, Manningham	Bradford	2.01	Short Term		Allocated	None	Brownfield	N	Class C	N	N	Medium	Class C/Unclassified	06-10	Poor	Good	Excellent	Good	Free Flowing	Grassland	Slight Gradient (Unlikely to inhibit)	Retail / Restaurant / Bus Stops	Good	Business General Industrial Occupied	Business General Industrial Occupied	Residential Occupied	Retail Occupied	new ind dev in vicinity of site	Local	Class C	This site is located adjacent to an existing Wickes retail outlet although there are other employment uses located to the north. The site is separated from the residential uses to the south by a considerable level change and the site already has a spine road in place which facilitates development.		
E/BW/07/0001/00	Thornton Rd, Greenfield Lane	Alerton	0.27	Medium Term, expansion site		Allocated	None	Infill	N	Class C	N	N	Low	Class B	06-10	Poor	Poor	Excellent													Local	Class C	This site forms a small strip of employment land fronting on to Thornton Road which forms expansion land for the adjacent Manningham Concrete site. Because of the small size of the site, demand is only likely to come from the adjoining user and this will depend upon their expansion plans.	
E/BW/17/0003/00	Prospect Street/Rouse Fold	East Bowling, Bradford	0.82	Medium to Long Term		Allocated	Expired Consent	Brownfield	N	Class B	N	N	Low	Class C/Unclassified	06-10	Excellent	Excellent	Excellent														Local	Class C	The site currently consists of several buildings which are towards the end of their useful economic life and, fronting on to Prospect Street, a building merchant. The site should be retained for future development of small business units in the medium to long term once the site becomes fully vacant.
E/BW/23/0003/00	Thornton Road	Thornton, Bradford	6.68	Medium Term, issues as to why site not already developed		Allocated	None	Greenfield	N	Class C	N	N	Low	Class B	06-10	Poor	Poor	Excellent	Excellent	Free Flowing	Grassland	Slight Gradient (Unlikely to inhibit development)	Retail / Restaurant / Bus Stops	Excellent	Retail Occupied; Road Frontage	Business General Industrial Occupied; Open Countryside	Open Countryside	Open Countryside	large site capable of accommodating a number of users	Local	Class C	The site is a large greenfield site located off Thornton Road close to the A644. The site is relatively remote and whilst it may provide expansion to some of the existing provision at this location, it is considered that demand is relatively low at this location.		
Potential Reserve (source: sites deallocated through UDP review process and windfalls)																																		
E/BW/27/0002/00	Greenfield Lane	Alerton	0.27	Medium Term		Deallocated	None	Greenfield	N	Class C	N	N	Low	Class C/Unclassified	06-10	Poor	Poor	Excellent														Local	Class C	
E/BW/27/0002/00	Greenfield Lane	Alerton	0.27	Medium Term		Deallocated	None	Greenfield	N	Class C	N	N	Low	Class C/Unclassified	06-10	Poor	Poor	Excellent														Local	Class C	The site is located on the rear of a large old mill building which front Thorne on to Thornton Road. There is evidence of some modern industrial construction in the immediate west and south west and there is a considerable level change between the site and the residential uses to the north and east. It is considered that the site should be retained for future expansion of the existing development uses at this location.
E/BW/27/0002/00	Land Between Thornton Road and Greenfield Lane	Alerton	0.11	Medium Term, need to address issue of coherence on park		Deallocated	None	Greenfield	N	Class C	N	N	Medium	Class B	06-10	Good	Excellent	Good	Free Flowing	Grassland	Predominantly Flat	Retail / Restaurant / Bus Stops	Poor	Business General Industrial Occupied	Business General Industrial Occupied	Road Frontage	Road Frontage	Independent site or extn	Local	Class C	The site is located near to the junction of Greenfield Lane and Thornton Road on the west of Bradford. It is currently set out as car parking buildings and car surface car parking. Should demand not be forthcoming for appropriate uses, it is not considered that the site should be retained as a reserve.			
E/BW/27/0023/00	Land Adjoining Town End and Cannon Mill Lane	Great Horton	0.32	Short Term		Deallocated	None	Greenfield	N	Class C	N	N	Low	Class C/Unclassified	06-10	Poor	Good	Excellent													Local	Class C	This site is located on an elevated site on Beckside Road close to Great Horton Road. The site is a very small site with limited development potential. Its position in topographical terms renders it divorced from adjacent nearby industrial uses. Land to this site is remote from other employment uses and surrounded by residential premises. We would recommend the deallocation of this site and reallocation as housing land.	
E/BW/27/0032/00	Great Horton Road	Great Horton	0.38	Short Term		Windfall	None	Greenfield	N	Class C	N	N	Low	Class C/Unclassified	06-10	Poor	Good	Excellent													Local	Class C	This site is located to the rear of a large mill which is currently being marketed for residential development. Given the residential nature of the other surrounding uses, we	
E/BW/27/0007/00	Drummond Training Centre, Lumb Lane	Bradford	0.94	Long Term for Employment Use		Deallocated	Extant consent	Infill	N	Class C	N	N	Low	Class C/Unclassified	05-10	Good	Excellent	Excellent													Local	Class C		
E/BW/07/0002/00	Land off Greenfield Lane	Bradford	0.71	Short Term - Potential Residential Redevelopment within Vicinity of Site		Deallocated	Expired Consent	Infill	N	Class C	N	N	Low	Class C/Unclassified	06-10	Poor	Poor	Excellent													Local	Class C		

Total UDP supply in Bradford West (ha)	14.30
Retain (Green) ST	6.53
Retain (Green) MT	1.09
Retain (Green) LT	0
Potential (Yellow) ST	0.00
Potential (Yellow) MT	6.68
Deallocate (Red)	0
Potential Reserve (ha)	5.01
Retain (Green) MT	3.37
Potential (Yellow)	0.71
Deallocate (Red) ST	0.70
Deallocate (Red) LT	0.94

Site Information										Environmental Issues				Accessibility					Site Assessment													
BMDC Ref	Site Address	Settlement	Size (Ha)	Availability	Regen Area	UDP Status	Planning History	Current Land Use	Adj. Green Belt	Location	Adj. AONB	Adj. Other Environmental Designation	Flood Risk	Site Access	Air	Rail	Bus	Road	Access Suitability	Road Network	Cover	Topography	Local Facilities	Surrounding Area Condition	Surrounding Uses North	Surrounding Uses East	Surrounding Uses South	Surrounding Uses West	Other Information	Market Significance	Marketability	
Allocated Supply																																
EKY/08/0014/00		Silsden	0.68	Short Term	Airedale	Allocated														Good	Free Flowing	Grassland	Predominantly Flat	Retail / Restaurant; Railway Station; Bus Stops; Public Provision;	Good	Business General Industrial Occupied;	Residential Occupied;	Business Office Occupied;	Road Frontage;	small sliver of land between building society and existing industrial use - only real potential for extn of existing users -		
EKY/13/0003/00	Land East of Ashlands Road	Ilkley	1.03	Medium	N/A	Allocated	None	Greenfield	N	Class C	N	N	High	Class A	06-10	Excellent	Excellent	Excellent	Good	Free Flowing	Grassland	Predominantly Flat	Retail / Restaurant; Railway Station; Bus Stops;	Good	Business General Industrial Occupied;	Business Office Vacant; Business Office Occupied; Road Frontage;	Residential Occupied; Road Frontage;	Residential Occupied; Road Frontage;	allotments also to east - land appears to be council owned - currently open space - potentially used as local amenity space - close to town centre to use facilities	Local	Class B	
EKY/08/0004/00		Steeton	0.56	Long Term		Allocated													Poor	Free Flowing	Vacant	Predominantly Flat	Railway Station; Bus Stops; Public Parking; Cycle Provision;	Good		Open Countryside;	Open Countryside;	Business General Industrial Occupied;	rail line to north - only suitable as extn to existing - currently vehicle storage area for uses			
Potential Reserve (source: sites deallocated through UDP review process and windfalls)																																
EKY/08/0015/00		Silsden	13.13	Short Term	Airedale	Inspector Removed													Excellent		Grassland	Predominantly Flat	Retail / Restaurant; Railway Station; Bus Stops; Public Parking;	Good	Business General Industrial Vacant; Business General Industrial Occupied; Business Storage Vacant; Business Storage Occupied;	Open Countryside;	Road Frontage;	Road Frontage;	southern portion flood risk - dev would have to be in keeping with nature of surrounding dev mindful of topo and potential impact on open env			

Total UDP supply in Ilkley, Steeton & Silsden (ha)	2.27
Retain (Green) ST	0.68
Retain (Green) MT	1.03
Retain (Green) LT	0
Potential (Yellow) LT	0.56
Deallocate (Red)	0
Potential Reserve (ha)	13.13
Retain (Green) ST	13.13
Potential (Yellow)	
Deallocate (Red)	

Market View

DTZ Comments

This site provides expansion land to the existing business park and should be retained as such. The recent development which has been undertaken at the business park has been relatively successful now being fully let. The land is underdeveloped and available for development immediately although it is considered that this site will most likely be developed out in the medium term.

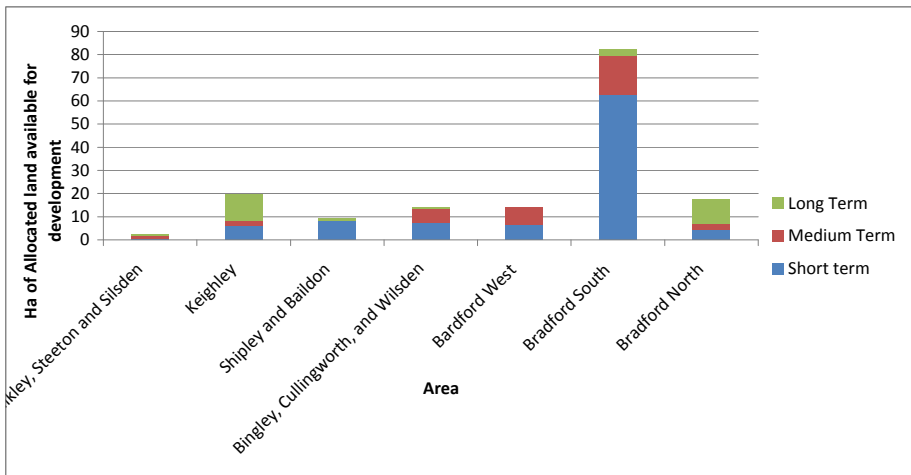
There is a question mark over the mature / semi-mature trees on part of the site adjacent to the A65 which if protected may reduce the ability of the site to provide a frontage / profile to the site and may preclude access. There are also trees to the rear of the site. Access from Dansk Way on the adjacent business park seems to be precluded by the existence of existing surface level parking. Access from Ashlands Road, which is residential in nature is not entirely appropriate. The provision of an access solution to the A65 would most likely prove to be too expensive. There are two rows of terraced housing in the south west corner of the site which we feel detract from the marketability of the site. Nevertheless, this is only remaining employment allocation in the town. Further work as to an access solution and financial viability will prove whether the site should be retained.

This site is located immediately adjacent to the railway station and could possibly be used to provide small scale business units although the site is small, long and narrow and awkward for such development. The employment allocations in Silsden (around the business park) provide better opportunities to deliver development and should be encouraged first. Should the land at the west of the site (which includes two existing buildings) be capable of being included in a development site however it is foreseeable that the site could be developed for residential use. The site has excellent proximity to the railway station and would prove popular for commuters.

This sites provides land for the long term expansion of the business park and should be retained as such. The recent development which has been undertaken at the business park has been relatively successful now being fully let. It is considered that this land should only be developed once the remaining land at the business park has been developed (unless there is a specific requirement which cannot be accommodated on the remaining plots on the business park).

Allocations by area of the city

	Short term	Medium Term	Long Term	Total	specified total on sheets	
Ilkley, Steeton and Silsden	0.68	1.03	0.56	2.27	2.27	2.27
Keighley	6	2.5	11.4	19.9	19.9	19.9
Shipley and Baildon	8.15	0	0.98	9.13	9.13	9.13
Bingley, Cullingworth, and Wilsden	7.53	5.81	0.62	13.96	13.96	13.96
Bardford West	6.53	7.77	0	14.3	14.3	14.3
Bradford South	62.61	16.86	2.88	82.35	82.35	82.35
Bradford North	4.39	2.55	10.28	17.22	17.22	17.22
Total				159.13	159.13	159.13



	Retain	Potential	De-allocate	check	
Ilkley, Steeton and Silsden	1.71	0.56	0	2.27	2.27
Keighley	17.06	1.73	1.11	19.9	19.9
Shipley and Baildon	0	6.31	2.82	9.13	9.13
Bingley, Cullingworth, and Wilsden	7.53	5.81	0.62	13.96	13.96
Bardford West	7.62	6.68	0	14.3	14.3
Bradford South	81.06	0.8	0.49	82.35	82.35
Bradford North	14.24	0.43	2.55	17.22	17.22
Total	129.22	22.32	7.59	159.13	159.13

