

City of Bradford MDC
Employment Land Review
Final report

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1 Introduction

1.1 Purpose of the study

- 1.1 The Council is progressing its new Local Plan Publication Draft. The Employment Land Review (ELR) forms an important part of the evidence base in relation to employment land need.
- 1.2 The ELR considers economic growth in Bradford District over the plan period 2023-2041 with a focus on employment and the associated land requirement. This will support the Council to identify a suitable number and distribution of sites to accommodate future levels of economic growth.
- 1.3 The study will form a key part of the evidence base for the Local Plan Publication Draft (REG19).

1.2 Key objectives

- 1.4 The overarching objective of the study to assess the realistic range of future employment growth in Bradford District over the plan period 2023-2041, and in turn the employment land requirement.
- 1.5 It is particularly important for the study to take account of significant changes that have occurred since previous employment land related work. In doing so, the ELR considers:
 - The implications of changing working practices arising from the Covid-19 Pandemic;
 - The challenges of current economic uncertainty and ongoing structural changes in the UK economy (including Brexit); and
 - The implications of recent Planning Use Class changes in relation to introduction of Class E.
- 1.6 This informs the approach to the study.

1.3 Approach

- 1.7 Our approach is based on guidance within the National Planning Policy Framework (NPPF) and the Planning Practice Guidance (PPG). Accordingly, it develops the evidence base in relation to the need for land or floorspace for economic development, including both the quantitative and qualitative need for all foreseeable types of economic activity over the plan period.
- 1.8 The analysis considers a range of future outcomes for economic growth. This is informed by the latest econometric forecasts for Bradford (as published by Oxford Economics and Experian Regional Econometric Model (REM)). In considering a potential higher growth scenario, the work draws upon the findings of recent work to explore future employment growth potential in

Bradford (in the Employment Growth Paper (EGP)). The EGP is an important part of the evidence base in this regard, in lieu of a new Economic Strategy (ES) being prepared for Bradford.

- 1.9 In addition to the desk-based analysis, engagement with businesses and local property agents has been a key part of this work. This engagement took the form of online surveys. It is noted that in depth discussions held with a sample of local businesses in the EGP also supplements this evidence.
- 1.10 The preparation of the ELR has involved close joint working with the Council – both with planning and economic development functions. In particular, the Council has provided the data and analysis that informs the supply-side element of the work (Section 5). The Council has also engaged with wider economic development stakeholders including the West Yorkshire Combined Authority (WYCA).
- 1.11 Ensuring consistency with housing evidence for the Local Plan, the scenarios for employment growth in the ELR were provided to consultants undertaking demographic/housing analysis in order to explore the implications of employment led growth.
- 1.12 The analysis considers the plan period 2023-2041. It informs the basis of planning policies for the retention, regeneration, or re use of existing employment land, and for allocations for new employment land for E(g), B2 and B8 uses (as defined by the Town and Country Planning (Use Classes) Order 1987 (as amended) and the Town and Country Planning (General Permitted Development) Order 1995 (as amended). It also advises on the appropriate overall amount, type, and distribution of employment land.

1.4 Structure of this report

- 1.13 The remainder of this report is structured as follows:
 - Section 2 outlines the policy context in terms of key planning policies and economic development documents;
 - Section 3 sets out the economic context and identifies the Functional Economic Market Area (FEMA);
 - Section 4 provides an overview of the property market context;
 - Section 5 provides a summary of employment land supply;
 - Section 6 explores the future requirements for employment land and key conclusions;
 - Section 7 outlines the demand-supply balance.
- 1.14 Further supporting material is provided in the Appendix.
 - Appendix 1 – Employment land need methodology; and
 - Appendix 2 – Employment allocations.

1.15A separate sites assessment document produced by the Council sits alongside this ELR document.

2 Policy context

2.1 Overview

- 2.1 This section provides a summary of the key planning policy and economic strategy documents relevant to the ELR.

2.2 National

National Planning Policy Framework (NPPF)

- 2.2 The revised NPPF was published in September 2023, this document sets out the Government's planning policies for England and how these should be applied. It provides a framework within which locally prepared plans for housing and other development can be produced. The NPPF requires that applications for planning permission be determined in accordance with the development plan unless material considerations indicate otherwise.
- 2.3 Planning policies should (Paragraph 81):
- a) set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration;
 - b) set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
 - c) seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and
 - d) be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances.
- 2.4 Planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for clusters or networks of knowledge and data-driven, creative or high technology industries; and for storage and distribution operations at a variety of scales and in suitably accessible locations (Paragraph 82).
- 2.5 The preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and take into account relevant market signals (Paragraph 31).

Planning Practice Guidance (PPG)

2.6 In 2014 the Government launched the Planning Practice Guidance (PPG) web-based resource. This website brings together many areas of English planning guidance to support the implementation of the NPPF.

2.7 Paragraph 041 advises that authorities use the following to assess:

- the need for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the existing and future supply of land available for economic development and its suitability to meet the identified needs. This should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land;
- the likely availability and achievability of employment-led development, taking into account market signals;
- the role, capacity and function of town centres and the relationship between them, including any trends in the performance of centres;
- locations of deprivation which may benefit from planned remedial action; and
- the needs of the farming and food production industries, including the location and extent of the best and most versatile agricultural land, and the ways in which planning could support investment in those industries.

2.8 Paragraph 025 concerns economic development and states that strategic policy-making authorities will need to prepare a robust evidence base to understand existing business needs, which will need to be kept under review to reflect local circumstances and market conditions. National economic trends may not automatically translate to particular areas with a distinct employment base. Where appropriate, local planning authorities can use their Authority Monitoring Report and the plan review process to ensure that their evidence base remains up to date.

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

2.10 Paragraph 026 states that in gathering evidence to plan for business uses, strategic policy making authorities will need to liaise closely with the business community, taking account of the Local Industrial Strategy, to

understand their current and potential future requirements. They will need to assess:

- the best fit functional economic market area;
- the existing stock of land for employment uses within the area;
- the recent pattern of employment land supply and loss – for example based on extant planning permissions and planning applications (or losses to permitted development);
- evidence of market demand (including the locational and premises requirements of particular types of business) – sourced from local data and market intelligence, such as recent surveys of business needs, discussions with developers and property agents and engagement with business and economic forums;
- wider market signals relating to economic growth, diversification and innovation; and
- any evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively.

2.11 Paragraph 008 provides guidance which states that an assessment of land availability needs to identify all sites and broad locations (regardless of the amount of development needed) in order to provide a complete audit of land available. The process of the assessment will provide the information to enable an identification of sites and locations that are most suitable for the level of development required. Paragraph 009 explains that plan-makers will be required to assess a range of different site sizes from small-scale sites to opportunities for large-scale developments such as village and town extensions and new settlements where appropriate.

2.12 Paragraph 012 requires that the process to identify land is to be transparent and identify as many potential opportunities as possible, it is important to issue a call for sites and broad locations for development. This needs to be aimed at as wide an audience as is practicable so that those not normally involved in property development have the opportunity to contribute. This can include notifying parish councils and neighbourhood forums, landowners, developers, businesses and relevant local interest groups, as well as local publicity. A call for sites will need to set out the information sought from respondents, which could include:

- site location;
- suggested potential type of development (e.g. economic development uses – retail, leisure, cultural, office, warehousing etc; residential – by different tenures, types and needs of different groups such as older people housing, private rented housing and people wishing to build or commission their own homes);
- the scale of development; and

- constraints to development.

Build Back Better: Our plan for growth (2021) & The Growth Plan (2022)

- 2.13 The March 2021 Budget was accompanied by the publication of “Build Back Better: our plan for growth”, a policy paper which sets out the Government’s plans to support economic growth through investment in infrastructure, skills and innovation. It provides a new framework that supersedes the 2017 Industrial Strategy as a central policy reference point.
- 2.14 The plan for growth focuses on three pillars of investment to act as the foundation on which to build the economic recovery, uniting and levelling up the country: Infrastructure, Skills and Innovation.

Infrastructure - *“High quality infrastructure is crucial for economic growth, boosting productivity and competitiveness. The UK has historically underinvested in infrastructure, but we are fixing that, starting with £100 billion of capital investment in 2021-22”*

Skills - *The best way to improve people’s life chances is to give them the **skills** to succeed. The UK has a strong foundation of advanced skills, but lags behind international comparators on technical and basic adult skills. The government is transforming Further Education, encouraging lifelong learning through the Lifetime Skills Guarantee, and building an apprenticeships revolution.”*

Innovation - *Innovation drives economic growth and creates jobs. The UK has a world-leading research base, which will be boosted by the government’s significant uplift in R&D investment and the creation of the Advanced Research & Invention Agency to fund high- risk, high-reward research. However, too few businesses are able to access the tools they need to translate new ideas into new products and services and to challenge established businesses. We will make the UK the best ecosystem in the world for starting and growing a business. That means having the best access to capital, skills and ideas, as well as a smart and stable regulatory framework.”*

[Build Back Better: our plan for growth]

- 2.15 The Build Back Better strategy outlined new funding arrangements including the deployment of the Shared Prosperity Fund to replace European Union structural funds.
- 2.16 The Infrastructure Pillar will be supported by the following interventions:
- Stimulate short-term economic activity and drive long-term productivity improvements via record investment in broadband, roads, rail and cities, as part of capital spending plans worth £100 billion next year.
 - Connect people to opportunity via the UK-wide Levelling Up Fund and UK Shared Prosperity Fund, as well as the Towns Fund and High Street Fund, to invest in local areas.
 - Help achieve net zero via £12 billion of funding for projects through the Ten Point Plan for a Green Industrial Revolution.

- Support investment through the new UK Infrastructure Bank which will ‘crowd-in’ private investment to accelerate progress to net zero, helping to level up the UK. This will invest in local authority and private sector infrastructure projects, as well as providing an advisory function to help with the development and delivery of projects.
- 2.17 The plan for growth is focused on driving the Government’s levelling up agenda, which aims to regenerate struggling towns in all parts of the UK via the UK Shared Prosperity Fund and the UK-wide Levelling Up Fund, with Freeports across the country.
- 2.18 The Plan goes on to set out the Government’s long-term vision for every region and nation to have at least one globally competitive city at its heart to help drive prosperity. This includes City and Growth Deals, £4.2 billion in intra-city transport settlements from 2022-23, and continued Transforming Cities Fund investment to 2022-23. It also aims to catalyse centres of excellence, supporting individuals across the country to access jobs and opportunities by ensuring digital and transport connectivity, by establishing a new UK Infrastructure Bank in the North of England and by relocating 22,000 Civil Service roles out of London.
- 2.19 The more recent Growth Plan 2022 was set out parliament in September 2022. The Growth Plan 2022 makes growth the government’s central economic mission, setting a target of reaching a 2.5% trend rate. It asserts that sustainable growth will lead to higher wages, greater opportunities and provide sustainable funding for public services.
- 2.20 To drive higher growth, the government will help expand the supply side of the economy. The Growth Plan sets out action to unlock private investment across the whole of the UK, cut red tape to make it quicker to deliver the UK’s critical infrastructure, make work pay, and support people to get onto the property ladder. New Investment Zones will provide time-limited tax reliefs, and planning liberalisation to support employment, investment, and home ownership.
- 2.21 The Growth Plan asserts that taken together, reforming the supply side of the economy, cutting and simplifying tax, and maintaining fiscal discipline will drive efficiency, enhance UK competitiveness, and help to boost growth sustainably in the long term.
- 2.22 In relation to industrial sectors, the Growth Plan seeks to unlock billions of pounds of investment into scaling up the UK’s science and technology firms to help highest-potential, innovative businesses accelerate their growth. The financial services sector is also at the heart of the government’s programme for driving growth across the whole economy.
- 2.23 Investment Zones are a key part of the strategy, with the government working with the devolved administrations and local partners to introduce Investment Zones across the UK. Investment Zones aim to drive growth and unlock

housing. Areas with Investment Zones will benefit from tax incentives, planning liberalisation, and wider support for the local economy.

2.24 In the 2023 Autumn Statement, the Government announced that the Investment Zones programme in England will be extended from 5 to 10 years.

2.3 Sub-regional

Strategic Employment Land Review for Leeds City Region (2016)

2.25 A Strategic ELR for Leeds City Region was undertaken in 2016. The purpose of the study was to provide a strategic overview of the demand for, and supply of employment land across the city region. The methodological approach was based on National Planning Policy and Practice albeit tailored to a strategic approach in that it did not include site specific analysis and recommendations.

2.26 The analysis utilised the REM model and considered three scenarios: baseline, policy led based and achieving the UK growth rate. These scenarios showed a range of land requirement of between from 425 to 538 hectares before making allowances for losses in B1 and B8 and the operation of the market.

2.27 The work tested this net change figure by comparing it with trends in past take up of employment land over the full economic cycle. This trend figure suggested a much higher requirement of 1275ha. It noted that the view of stakeholders was that the trends in past take provided a more realistic position on the overall land requirement.

2.28 The study concluded that the overall current supply of employment land at that time was sufficient to meet the requirements of current Plan periods. However, that in some parts of the city region this supply included a legacy of allocations from previous Development Plans judged to be unsuited to modern business requirements. Analysis of the market for employment land identified a number of further shortcomings in the current land supply which includes specialist provision for university spin off businesses, provision for advanced manufacturing and strategic sites for inward investment.

2.29 The study identified the following conclusions and recommendations:

- The development of a pipeline of sites for intervention investment. This work will inform the emerging LCR Infrastructure Investment Framework.
- A continued dialogue on strategic cross boundary issues, particularly where Travel to Work Areas cross plan boundaries.
- Further investigation of the quality of the supply in cross boundary areas e.g. Corridors such as the M62, M1, A1/M1, Airedale Skipton/Bradford and in the SEP spatial priority areas.

- Explore the role of strategic sites in broadening the portfolio of sites in the city region.
- Scope the role and benefits of further feasibility work for the SEP's Spatial Priority Areas (similar to the approach currently underway for the M62 Corridor Enterprise Zone sites).

Leeds City Region Strategic Employment Evidence: Land and Property (2021)

- 2.30 The purpose of this study was to provide the West Yorkshire Combined Authority (WYCA) and its partners in the Leeds City Region (LCR) with an understanding of the commercial property market trends in the city region and the interventions needed to support economic growth. This included an assessment of the current supply of strategic employment sites in the city region and whether this is adequate to meet the future growth of the city region economy.
- 2.31 In relation to the office market, the work identifies the hierarchy of office market locations in LCR, with the dominant market being Leeds city centre, which accounts for roughly 60% of take-up and over 90% of demand for Grade A space. The other most significant office markets for meeting strategic demand are in business parks on the outskirts of Leeds and in York and Harrogate. Outside these areas, most demand is from small businesses serving a local market. The study has shown that the role of offices is changing. Even before the Covid 19 pandemic there was evidence of a move away from long term leases towards more flexible use of space, including managed space, serviced offices and co-working.
- 2.32 If take-up increased in line with past trends, it estimates a requirement for around 108 Ha of employment land. It notes that in practice demand could be substantially lower than this (especially as the work was undertaken at the height of the Pandemic). It concludes that the 113 Ha of land identified on strategic employment sites which are suitable for office development is sufficient to meet demand.
- 2.33 In relation to the industrial market, the work notes that there has been record levels of take-up of industrial and warehouse space in recent years. This has been driven by the growth of online shopping which is created unprecedented demand for strategic warehouse space. Demand for industrial space has also been growing but is small in comparison, accounting for less than 20% of market activity. Covid-19 and Brexit are both likely to increase demand for warehouse space but dampen demand for industrial space over the next few years.
- 2.34 If take-up increased in line with past trends, it estimates a land requirement of around 1,285 Ha. The split between industrial and warehouse space is uncertain but the majority of this is likely to be required for warehouse development (over 1,000 Ha). It is noted that these results should be treated with a degree of caution. Although the study expects the growth of online

shopping to continue to drive demand for warehouse space, it asserts that there are grounds to believe that the very high levels of take-up of recent years are being skewed by the need to adjust to changing shopping habits. The view is that once the market has adjusted to this change, demand will plateau, although the timescales for this are uncertain.

- 2.35 It concludes that the identified strategic sites include 1,005 Ha of land which is suitable for industrial/warehouse development. The pipeline of strategic sites would therefore not be sufficient to meet all of the requirement for industrial and warehousing land. However, they could accommodate around over three quarters of it and should be sufficient to meet all of the demand from strategic occupiers. The remaining 23% would need to be accommodated on other non-strategic sites around the city region. It also asserts that there is an undersupply of strategic sites in western districts where there is likely to be demand from manufacturing businesses, particularly Calderdale and Bradford but also Kirklees. These are all adjacent districts, covering a large part of the M62 corridor which suggests there may be limited potential for growing businesses to relocate nearby if supply was constrained in future.
- 2.36 The study recommends that as a minimum, an additional 80 Ha of land is identified across Bradford, Calderdale and Kirklees. This would be sufficient to accommodate an additional five years of demand, based on past levels of take-up of floor space. Further, that this should prioritise: (i) Large sites close to the motorway network and (ii) Expansion of existing industrial estates to provide grow on space for existing businesses.

West Yorkshire Economic Strategy Prospectus

- 2.37 An overarching Economic Strategy for West Yorkshire is planned by the West Yorkshire Combined Authority (WYCA) – accompanied by an Inward Investment Strategy.
- 2.38 The West Yorkshire Plan is the overarching strategy for West Yorkshire, setting the trajectory up to 2040. The new West Yorkshire Economic Strategy will be critical to achieving this vision. The strategy will reflect WYCA's expanded policy remit following devolution. WYCA has signalled its intention to achieve a net zero region by 2038 and to embed equality, diversity and inclusion across its policy.
- 2.39 The West Yorkshire Economic Strategy will set out how WYCA will deliver the economic aspects of the West Yorkshire Plan vision and missions. The WY Economic Strategy will have links across all five of the WY Plan missions but will have a particular focus on the first mission (A prosperous West Yorkshire, an inclusive economy with well paid jobs). This mission outlines the following to be achieved by 2040:
- Closed the productivity gap between West Yorkshire and the UK;
 - Living standards above the national average, with no child growing up in poverty;

- Good quality work available for all; and
- A diverse and inclusive workforce, where everyone who wants to work can.

2.40 The underpinning actions to achieve this will focus on:

- Increasing productivity;
- Promoting an environment where it is easy for businesses to start, grow, innovate, trade and invest;
- Increasing business resilience;
- Digital transformation;
- Overseas inward investment; and
- Supporting export growth.

Enterprise Zone (EZ)

2.41 The Enterprise Zones programme consists of 10 sites across the Leeds City Region. With a contribution of £45m Growth Deal funding, the sites are able to provide a high standard premises for expanding businesses or businesses new to the Leeds City Region.

2.42 Phase 1 of the programme comprises a 142-hectare area in the Aire Valley, Leeds. Phase 2 of the programme comprises nine sites located along the strategic M62 corridor, including three Bradford sites; Gain Lane, Parry Lane and Staithgate Lane.

2.43 The key focus and Vision for the Enterprise Zones as set out in the Leeds City Region Strategic Economic Plan is ‘the acceleration of development and delivery of high-quality employment floorspace in the advanced and innovative manufacturing and complementary sectors’.

2.44 Companies locating within the Enterprise Zone will benefit from a wide range of incentives, including (depending on which Enterprise Zone site):

- Reduced business rates (worth up to £275,000 over a five-year period); or
- Enhanced capital allowance tax relief of qualifying plant and machinery.

2.4 Local

Bradford Metropolitan District Council Development Plan

2.45 The Development Plan for Bradford Metropolitan District Council currently comprises the following documents:

- Saved Policies of the Replacement Unitary Development Plan (adopted October 2005)
- Bradford Core Strategy (adopted July 2017)

- Bradford City Centre Area Action Plan (adopted December 2017)
- Shipley and Canal Road Corridor Area Action Plan (adopted December 2017)
- Bradford Waste Management DPD (adopted October 2017)

Replacement Unitary Development Plan

2.46 The Replacement Unitary Development Plan (RUDP) is the statutory Development Plan for the Bradford District. It was adopted by the Council on 15 October 2005. The RUDP allocated land on a number of sites for industry, warehousing, B1 offices and distribution, in a number of locations to meet the needs of the District.

Bradford Core Strategy (2017)

2.47 The Core Strategy is a key Development Plan Document (DPD) that forms part of the Local Plan for the Bradford District. It was adopted by the Council following Examination on 18 July 2017.

2.48 The Core Strategy:

- Sets out the broad aims and objectives for sustainable development within the Bradford District for the next 15 to 20 years until 2030.
- Sets out broad policies for guiding and restraining development.
- Sets out the broad locations for new housing, employment and infrastructure investment.
- Takes account of national and regional planning policy along with the Community Strategy.
- Does not allocate specific sites for new housing and employment development.

2.49 The main economic focus of the Core Strategy is to create the conditions where business thrives, generating opportunities to deliver jobs growth and prosperity across the District. It seeks to channel economic development into sustainable locations so that Bradford, together with its principal towns and range of smaller settlements can become a key driver within the Leeds City Region.

2.50 Policy EC1 provides an overview of how the Council will support a successful economy and sets out its position in the Leeds City Region.

2.51 Policy EC2 provides headlines in terms of the scale of jobs growth and employment land release that the plan will support.

2.52 Policy EC3 identifies the potential areas of search for a portfolio of employment sites (with a planned requirement for at least 135 ha of employment land) that are attractive to developers and investors and also provide employment opportunities for the working age population of the District. It sets the contribution each of the constituent geographical areas of

the District can make to the supply. It also identifies sources for new sites through extant strategies and regeneration initiatives.

Bradford City Centre and Shipley and Canal Road Corridor Area Action Plans (AAPs)

2.53 The Bradford City Centre AAP was adopted by Bradford Council on 12 December 2017.

2.54 The main economic focus of the Bradford City Centre AAP is to create a thriving economy with new office developments, and a growth in innovative and creative industries through technological enhancements. The priority will be to maintain existing and attract new businesses into the city centre, through the delivery of new Grade A office space in the No.1 City Park and other office development throughout the centre.

2.55 The super connected cities programme will deliver superfast broadband and cloud technology in the centre to attract business and industries looking for the best communications infrastructure in the country. Links with the University will also continue to be strengthened to promote Bradford City Centre as a hub for innovative and creative industries.

2.56 Policy B1 aims to deliver a significant proportion of the employment requirement identified in the Adopted Core Strategy (135 hectares) and aims to deliver at least 6,000 jobs in net additional high-quality office and flexible workspace over the plan period.

2.57 The Shipley and Canal Road Corridor AAP was adopted by Bradford Council on 12 December 2017.

2.58 The main economic focus of the Shipley and Canal Road Corridor AAP is to support sustainable economic growth and the transition to a low carbon economy by protecting and enhancing established employment areas and promoting a wide range of high-quality economic development opportunities within the Corridor.

2.59 Policy SCRC/SE1 aims to deliver new businesses and commercial uses as part of mixed-use developments in Shipley Town Centre, Dockfield Road and Shipley East. New employment generating uses within the New Bolton Woods development. Safeguarding and enhancing the Canal Road Employment Zone as an important employment area. Redevelopment of land and sites within Valley Road Retail Area.

Site Allocations DPD / Toward a new single Local Plan

2.60 In the summer of 2019, the Council began a partial review of the adopted Core Strategy. This was undertaken mainly in response to significant changes in Government guidance relating to assessing housing need (the introduction of the standard method), affordable housing, green belt, viability, and biodiversity net gain, as well as updated evidence and emerging local and national approaches to climate change.

- 2.61 The initial scoping consultation in January / February 2019 set out the range of key Core Strategy policies which are considered necessary to review in light of changes to national planning policy and local circumstances. These policies mainly relate to housing and employment.
- 2.62 Bradford Council consulted on the 'Preferred Options' (Regulation 18) of the Core Strategy Partial Review between 30 July and 24 September 2019.
- 2.63 However, in 2020 the Council started preparing a new single comprehensive Local Plan. This was based on a range of work undertaken as part of the development of the different DPDs and took account of earlier consultations as well as more recent circumstances and national policy. The plan sets out how the District will grow sustainably over the next 15 to 20 years and what it means for local communities.
- 2.64 The emerging Local Plan will include an up-to-date Policies Map which will on adoption supersede the RUDP Proposals Map, the adopted Core Strategy, the Bradford City Centre and the Shipley and Canal Road Corridor Area Action Plans and the Adopted Waste Management Development Plan Document.
- 2.65 The plan allocates land to meet the District's needs for new sites for housing and employment and a range of policies which will help guide development and the determination of planning applications. It also sets out new information on open spaces, green infrastructure and places of ecological value across the District.
- 2.66 Delivering the Council's net zero carbon ambition by 2038, tackling air pollution, supporting public transport, cycling and walking and making the District a more prosperous and greener place to live, work and enjoy are central to the plan.
- 2.67 The plan also sets out spatial strategies for local areas and settlements and how they may change over the plan period with the growth in new housing and employment opportunities and the protection of key local assets and features.
- 2.68 The better use of brownfield land and regeneration are at the heart of the new Local Plan with strong ambitions for the continued transformation of Bradford City Centre and many of our urban areas.
- 2.69 The Council consulted on the Bradford District Local Plan Preferred Options (Regulation 18) and supporting documents between 8th February and 24th March 2021. Work is progressing on the Regulation 19 Local Plan which will be published for representations prior to submission to the Secretary of State for public examination in 2023.

Bradford Employment Land Review (2007) and Update (2011)

- 2.70 The Employment Land Review was carried out at the end of 2007 in accordance with ODPM best practice guidance issued in December 2004.

2.71 The Report informed the development of policies in the Core Strategy Development Plan Document. It will also help to identify future sites for new industrial and commercial development as part of the Land Allocations Development Plan Document (DPD).

2.72 Due to changes to the structure of the national and local economies, particularly following the 2008 recession, the Council undertook an Update in 2011 of the Review as an addendum to the original document. The economic analyses and projections were updated, incorporating the most recent employment, economic and market statistics.

Bradford Employment Needs Assessment and Land Review (2019)

2.73 Peter Brett Associates and Aspinall Verdi completed an Employment Needs Assessment (ENA) for Bradford in 2019¹. The purpose of the ENA was to inform the Council's preparation of policies to support the economy and to help identify employment site allocations.

2.74 The ENA was published in July 2019.

2.75 The ENA suggested that the local economy is underperforming, particularly in relation to its ability to create high quality jobs. It also found that this underperformance is not the result of labour or land availability constraints.

2.76 The ENA's assessment of employment demand relates to a 19-year period (2018-2037). The total estimated employment land requirement is 70ha (comprising 10ha office and 60ha industrial). This implies an annual average requirement of 3.7ha (0.5ha office and 3.2ha industrial). The figures for both office and industrial represent 'policy off' conclusions.

2.77 These estimates are based on the December 2018 Experian forecast that projects jobs growth of 21,100 (+9%) over the period 2018-2037. This is equivalent to an annual average jobs growth of +1,111 jobs. It is noted the ENA did not use the REM forecast, although it was reviewed at the time of the study.

2.78 The ENA makes recommendations on the overall level of employment land provision for both office and industrial uses based on a 'policy off' scenario for future employment. It is noted that its estimates do not include or apply an allowance for 'margin of choice'.

Future Employment Analysis Paper (2020/21)

2.79 Since the publication of the ENA in July 2019, important changes in the economic environment occurred and further work was undertaken as part of the new Local Plan. In light of this, the Council considered it necessary to supplement the previous ENA work with an analysis focussed on future scenarios for employment. The analysis was undertaken in December 2020 to February 2021.

¹ 'Employment Needs Assessment: Bradford Metropolitan District Council', Peter Brett Associates with Aspinall Verdi (July 2019). Note - PBA is now part of Stantec.

- 2.80 The purpose of this study was to take forward the work in the ENA to provide a robust approach to determining future scenarios for employment growth and the associated employment land requirement. The study takes the form of an Addendum document, to be read alongside the 2019 ENA report.
- 2.81 The analysis used the then latest REM forecast (August 2020 release) which projected employment growth of 26,000 jobs in 2019-2038 (equating to an annual average of 1,368 jobs). The results indicate a total gross employment land requirement of +76.5 ha (an annual average of +4.0 ha) associated with this forecast. This largely driven by the growth of the Transport & storage sector for B8 uses and the Professional & Other Private Services sector for B1 uses.
- 2.82 The study concluded that the 82 ha of open market employment sites on the supply side was broadly sufficient to meet the estimated demand requirement at the District wide level.
- 2.83 The study notes that the employment change projected in the econometric forecasts should be considered alongside other demand side evidence such as historic employment trend growth, past take-up and economic policy/inward investment activity.

Bradford District Economic Strategy (2018-30)

- 2.84 The most recent available Economic Strategy for Bradford was published in 2018.
- 2.85 This set the aim to be the UK's fastest growing economy over the coming decade, increasing the value of our economy by £4 billion, getting 20,000 more people into work and improving the skills of 48,000 residents. To support this aim, the Economic Strategy prioritised actions to unlock four key opportunities:
1. OUR YOUNG AND ENTERPRISING POPULATION: ensuring all our people are equipped with the skills and confidence to succeed.
 2. OUR DISTINCTIVE OFFER: using our unique architecture, heritage and cultural assets to create compelling investment propositions and an environment for growth.
 3. OUR GROWTH POTENTIAL: building on our business and sector strengths to drive innovation, increase productivity and create wealth.
 4. OUR GLOBALLY CONNECTED DISTRICT: improving our transport infrastructure and digital connectivity to strengthen our global trading links and access new markets.

Bradford District's Economic Recovery Plan (2021)

- 2.86 A number of local priorities have already been set out by the 2021 Bradford District Economic Recovery Plan. This was published in February 2021 in response to the impact of the Pandemic.

- 2.87 The Bradford District's Economic Recovery Plan sets out how partners will sustain jobs and boost productivity whilst building an inclusive, sustainable and resilient local economy. The delivery of the plan will be overseen by the Bradford Economic Partnership.
- 2.88 The Economic Recovery Board stress-tested the existing strategy following the outbreak of Covid-19 to produce an effective and ambitious recovery plan. The plan addresses the economic challenges that have arisen due to the Covid-19 pandemic and seeks to capitalise on key opportunities such as the emergence of the green economy, whilst continuing to build a more inclusive, sustainable and resilient economy.
- 2.89 The plan notes that the impact of the Pandemic has undermined progress towards the ambition for the District and exposed and amplified many longstanding challenges such as high youth unemployment and low social mobility. It asserts that immediate prospects depend on controlling the pandemic, responding effectively and addressing the effects of the UK's exit from the European Union (EU) and leveraging the opportunities from devolution.

Emerging new Bradford Economic Strategy

- 2.90 An Economic Strategy (ES) is currently being developed by the Council.
- 2.91 The new ES will set out the future economic development strategy for Bradford to 2041, including a target ambition for jobs growth.
- 2.92 The ES will be complemented by a series of Development Frameworks for Bradford, Shipley, Bingley and Keighley. These were developed over Summer and Autumn 2023. Approved versions are expected in 2024 and will support development and regeneration ambitions, investment planning and commercial collaboration.
- 2.93 The new ES was not available during the timeframe of ELR production and consequently relies on the supplementary analysis of employment growth potential provided in the Employment Growth Paper (EGP) – see below.

Bradford Business Development Zone report (2019)

- 2.94 The Bradford District Business Development Zones (BDZs) are three priority employment areas located in Bradford, Keighley and Shipley.
- 2.95 In 2020 the Council published the Business Development Zones' report. The report looked at four areas within the BDZs, namely:
- Bowling Back Lane Bradford
 - Shipley from Saltaire to Dockfield Road
 - Dalton Lane, Keighley
 - Royd Ings, Keighley

- 2.96 All have a long history of employment related uses, but there was recognition by the Council that improvements would be needed to ensure they would still function as employment areas for existing and future business owners.
- 2.97 The report provides an initial assessment of how intervention could bring about regeneration of redundant land and premises and improve the quality of general environment. The report identifies 46 hectares of land as having potential for development in the next 5-7 years, with the capacity to create approximately 3,000 new jobs.
- 2.98 Within each BDZ, the report identifies a number of interventions areas and provides associated recommendations for improvement, inclusive of development principles and transport and environmental improvements.
- 2.99 The report was prepared pre-Covid 19 and the potential long-term effects on the demand for premises due to the virus are not considered.

Bradford Employment Growth Paper (2023/24)

- 2.100 The EGP document takes the form of a technical evidence paper to support the Council in enabling progression of the updated Employment Land Review (ELR) and to inform the development of a new Economic Strategy (ES). The primary goal of the analysis is to provide evidence on potential future employment growth in Bradford in the period to 2041.
- 2.101 The work uses a variety of data to analyse current and historic trends in employment in Bradford. The analysis explores employment, gva, business, SWOT, drivers of change and opportunity sectors. This informs recommendations on an appropriate higher growth scenario for employment in Bradford to 2041. Further to the desk-based analysis, engagement with businesses was a key part of this work. In addition to businesses, the Council also engaged with other key stakeholders including WYCA, Chamber and CBI.
- 2.102 The findings suggest that whilst Bradford has achieved positive employment growth over the 2000-2021 period, the level of growth achieved was below that in other comparator areas both in the West Yorkshire and national context. Accordingly, in principle there is potential for Bradford to close the existing 'growth gap' vs these comparator areas. This could be achieved through measures that support GVA growth and increased jobs density. Part of this will mean ensuring that existing businesses can grow within Bradford and an attractive business environment to attract new businesses into the area. In terms of the latter, attracting high growth potential businesses or larger businesses will assist in supporting employment growth.
- 2.103 The role of the EGP is to highlight the potential for future employment growth in Bradford in the context of considering a credible scenario in which a higher level of employment growth is achieved compared with baseline forecasts.

- 2.104 Taking into consideration the findings of the analysis, the EGP recommends that Bradford consider a higher growth scenario in the range of 12-15% growth in total employment over the 2021 level. This scenario would reflect a situation where a more supportive economic environment and improved macroeconomic conditions enables a higher level of growth to be achieved. This could be supported by economic development policy, increased infrastructure investment and greater land supply.
- 2.105 In terms of the ELR and the implications for employment growth in the plan period 2023-2041, this produces a higher growth scenario with annual average employment growth with the following range:
- Higher Growth Scenario REM+ Lower (1,346 jobs); and
 - Higher Growth Scenario REM+ Upper (1,682 jobs).

3 Economic Context

3.1 Overview

3.1 This section provides a summary of the relevant economic context, including:

- Geography and connections;
- Baseline economic conditions;
- Drivers of growth;
- Role of strategic employment locations;
- Changing working practices; and
- Functional Economic Market Area (FEMA).

3.2 This is relevant evidence in considering the future economic development needs of Bradford in terms of employment land needs.

3.3 The Employment Growth Paper (EGP) has established a comprehensive and up-to-date analysis of the employment and business base. This enables an understanding of the key changes taking place in the Bradford economy relevant to future employment growth potential. The EGP also identifies several key drivers of change as influential in the future path of growth. Some headlines from the employment analysis of the EGP are included in the baseline economic conditions sub-section. The EGP document should be referred to in terms of the detailed analysis, it is not intended to repeat the analysis here.

3.2 Geography and connections

3.4 Bradford District forms the second largest conurbation in the West Yorkshire sub region. The population of the district is around half a million people.

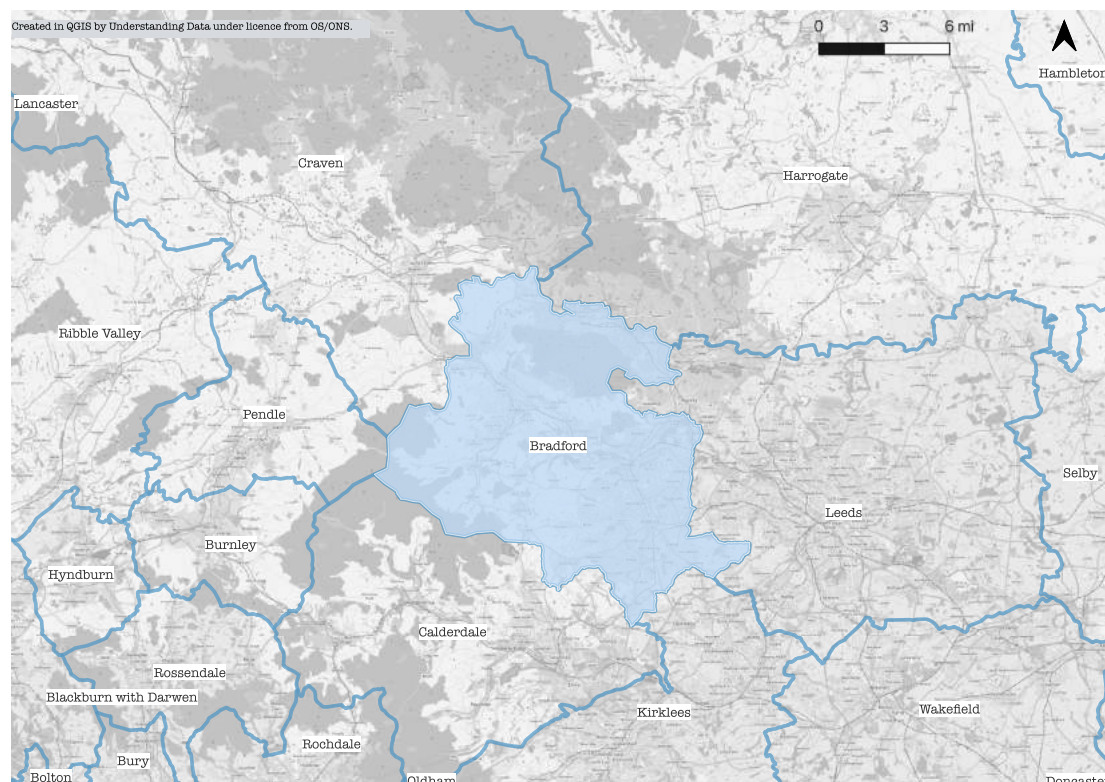
3.5 The District is located in West Yorkshire and is bounded by Leeds District to the east, Craven District to the northwest, and Calderdale and Kirklees to the south. The western boundary of the District forms part of the West Yorkshire and Lancashire County boundary.

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

3.7 Key transport links include 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 links to the North West via the A650 and M65. The District is served by Leeds-Bradford International Airport (located 7 miles from Bradford city centre).

- 3.8 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. Important tourist centres include Haworth (in the southwest), Saltaire (on the northern boundary of Bradford's urban area) and Ilkley. Western settlements also provide access to the Dales and tourism locations outside of the District.

Figure 3.1: Bradford District

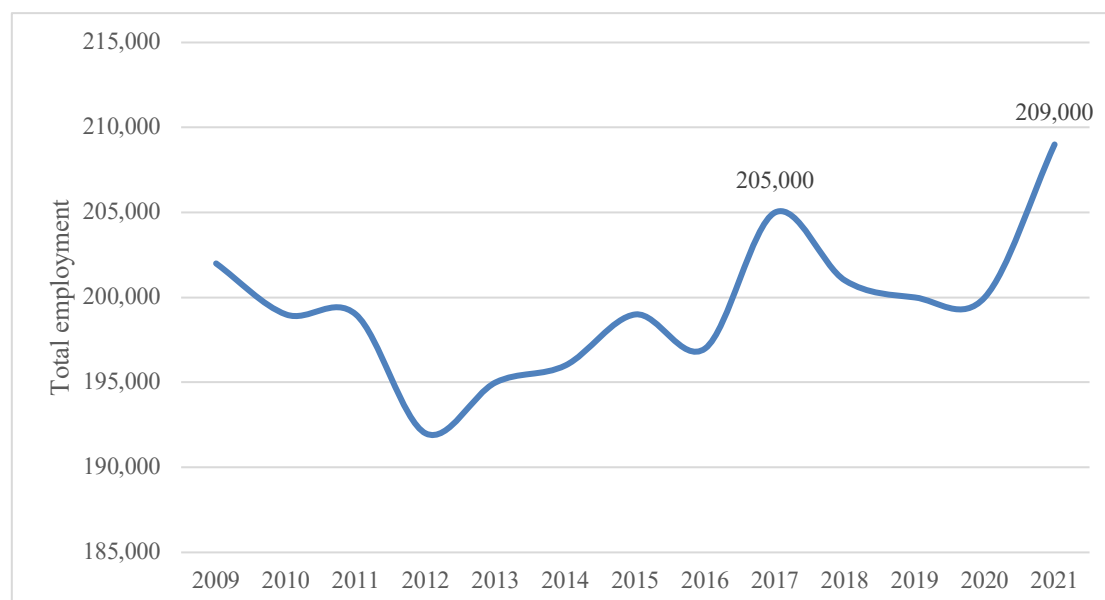


3.3 Baseline economic conditions

- 3.9 The Employment Growth Paper (EGP) has established an up-to-date analysis of the employment and business base.
- 3.10 Overall, the findings suggest that whilst Bradford has achieved positive employment growth over the 2000-2021 period, the level of growth achieved was below that in other comparator areas both in the West Yorkshire and national context. Accordingly, in principle there is potential for Bradford to close the existing 'growth gap' vs these comparator areas.
- 3.11 Some of the historic employment analysis in the EGP is particularly relevant context for the ELR. The historic analysis of Business Register and Employment Survey (BRES) data is outlined below. The BRES data provides a measure of workplace-based employment. The employment data in BRES comprises of employees and working owners (for example, sole proprietors and partners).

3.12 The data shows that for the period 2009-2021, total employment in Bradford increased by around 3.5% (+7,000 jobs). There was considerable variation over the period however, with a contraction in employment taking place 2009 to 2012 (reflecting the Late 2000s Recession) and a recovery to 2017. It is notable that in the final year of data available (2020-2021) there was a strong expansion in employment of around 4.5% (+9,000 jobs).

Figure 3.2: Total employment 2009-2021, Bradford

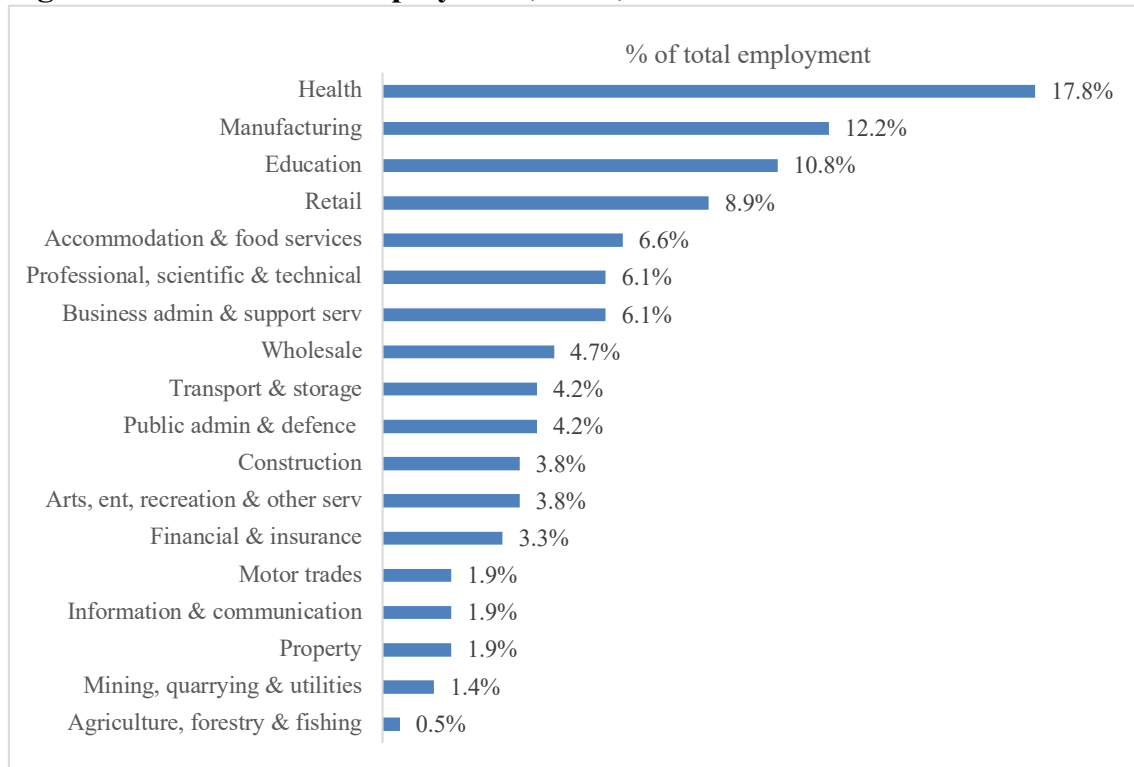


Source: BRES employment data. PAYE element removed from years 2016-2021 to enable comparison with years 2009-2015 which did not include PAYE.

3.13 In 2021, there were eight sectors with 10,000 or more jobs. Together, these sectors accounted for around 73% of total employment. The largest three sectors were Health (38,000 jobs), Manufacturing (26,000 jobs) and Education (23,000 jobs).

3.14 Figure 3.3 provides a breakdown in the share of employment by sector in 2021.

Figure 3.3: % share of employment, 2021, Bradford



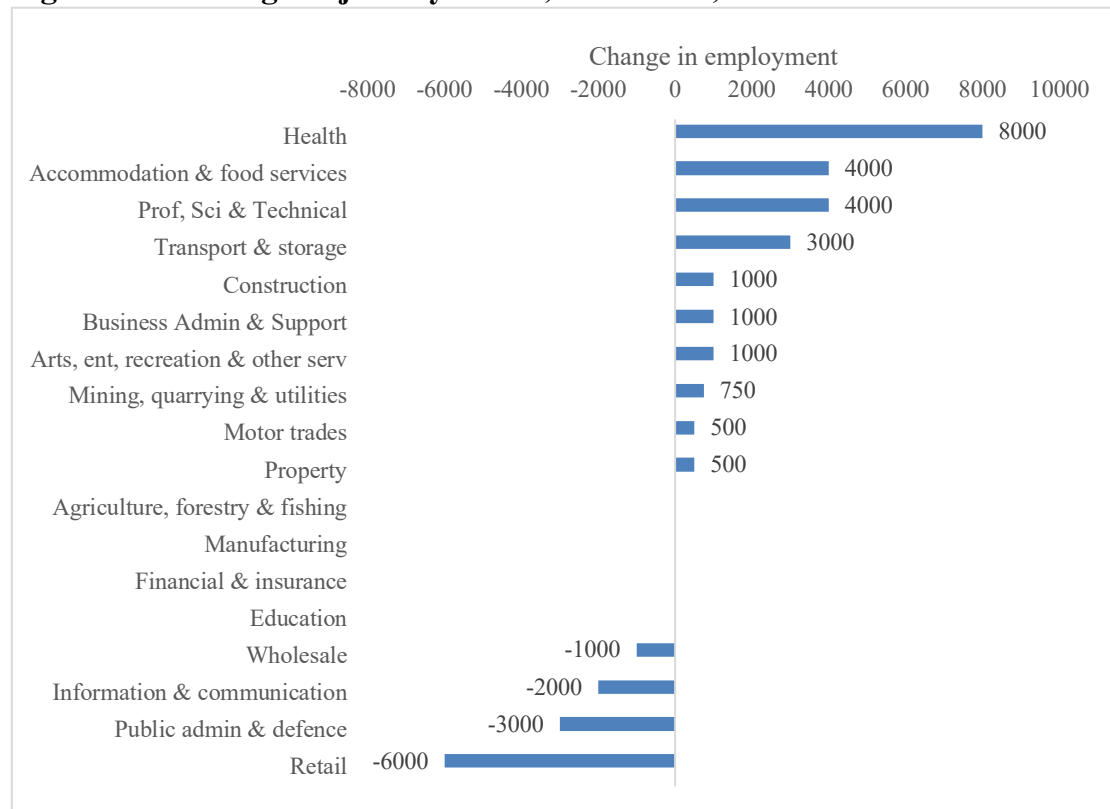
Source: BRES employment data.

3.15 Figure 3.4 shows change in employment by sector over the period 2009-2021.

3.16 Over this period, the largest absolute growth in employment numbers was in the Health (+8,000 jobs), Accommodation & Food Services (+4,000 jobs) and Professional, Scientific & Technical sectors (+4,000 jobs).

3.17 The total number of jobs in the Manufacturing and Education sectors – two of the three current largest sectors identified – was broadly unchanged in 2021 compared with 2009. The largest absolute contractions in total number of jobs were in the Retail (-6,000 jobs) and Public Administration & Defence (-3,000 jobs) sectors.

Figure 3.4: Change in jobs by sector, 2009-2021, Bradford



Source: BRES employment data.

3.4 Drivers of growth

3.18 There are ambitious plans for growth in Bradford. These are being driven forward through the activities of Bradford Council and the West Yorkshire Combined Authority (WYCA) with the Leeds City Region LEP.

3.19 Key economic policy documents directing this growth include the WYCA Strategic Economic Framework, LCR Strategic Economic Plan (SEP), LCR Local Industrial Strategy (LIS) and the Economic Strategy for Bradford. Broadly, these place emphasis on supporting the growth of a sustainable and inclusive economy and the growth of science, technology and supporting businesses.

3.20 In 2020, the West Yorkshire devolution deal was agreed with Government - unlocking more than £1.8 billion in investment to drive up living standards through better transport, improved skills and stronger businesses, while tackling the climate emergency. This agreement included a Government commitment to support the development of a West Yorkshire Mass Transit System and investment from the Transforming Cities Fund which, with the other resources available through the deal, will enable the delivery of the full pipeline of West Yorkshire transport projects submitted in the region's bid. The deal also included a guaranteed £1.1 billion over the next 30 years in a new West Yorkshire Investment Fund, money to develop plans for future housing sites and a new heritage fund. Specifically in relation to Bradford, this deal brought £500,000 of Government funding to support master-

planning in Bradford City Centre to maximise regeneration opportunities from Northern Powerhouse Rail (NPR).

- 3.21 Whilst the Government has recently cancelled some elements of the HS2 project, legislation for phase 2b is still included in the Government's legislative agenda. NPR was set to share some of this route and therefore there is expectation that NPR will go ahead. Bradford's NPR Growth Strategy (2019) set out the ambitions to transform the economy through a new high-speed rail connection in the city centre that will better connect the UK's youngest city to the opportunities of the future – with a focus on unlocking growth at the Southern Gateway to the city.
- 3.22 The Government has recently (October 2023) announced its Network North Plan. This commits to £19.8 billion to link the North's major cities – with more than £2 billion for a brand-new rail station at Bradford, halving journey times to Manchester. In addition, funding of £2.5 billion will ensure delivery of a West Yorkshire Mass Transit System for Leeds and the wider area, providing better connections to Bradford and Wakefield.
- 3.23 These major transport investments will be important in supporting future employment growth in Bradford in the longer-term.
- 3.24 Also in October 2023, the Government announced that Bradford would receive a further £20m worth of funding for Keighley, as part of the Government's Levelling Up programme. The latest funding package – under the government's Long-Term Plan - comes in addition to the £33.6m secured in 2021 for improvements in Keighley and the surrounding area as part of the Towns Fund.
- 3.25 Keighley Town Deal Board have successfully bid for £34.7m of Towns Fund grants with £15m allocated to create a Development Investment Fund that will be used to restore and repurpose buildings and redevelop sites for commercial use. Shipley Town Deal Board have successfully bid for £27.4m of Towns Fund grant with £8m allocated to create a Development Investment Fund.

3.5 The role of strategic employment locations

- 3.26 Strategic employment locations will also influence future growth.
- 3.27 Enterprise Zones (EZs) have played an important role in attracting investment to Bradford. There is an EZ programme across the Leeds City Region and embedded within the Leeds City Region Strategic Economic Plan (SEP) to provide high standard premises for expanding businesses or to attract inward investment. The particular economic focus for the enterprise zones within Bradford is to promote advanced manufacturing growth, building upon the regions strong manufacturing heritage.
- 3.28 The majority of Gain Lane EZ has been developed and taken up. Parry Lane EZ is currently being developed. This shows evidence of demand for

employment land. However, there are development constraints on the Staithgate Lane EZ making it a harder site to develop.

- 3.29 Policy EC2 (Bradford District Local Plan Preferred Options (Regulation 18)) provides policy direction for the development and delivery of employment and business zones within the District as part of the overall employment land strategy. Specifically, Policy EC2 (i) designates Enterprise Zones to provide premises of a high standard to businesses and to attract inward investment, (ii) designates Business Development Zones (BDZs) to support the regeneration of established employment areas and (iii) designates Employment Zones to maintain and support local business growth and development.

3.6 Changing working practices

- 3.30 The shape of modern work has evolved over recent years. Whilst some form of property remains necessary, the way workplaces look and behave has been undergoing substantial change. A range of factors has driven this trend.
- 3.31 From the perspective of businesses, there has been a need to improve the cost effectiveness of their property portfolio, whilst also providing an environment that enables them to attract staff, collaborate and innovate. From the perspective of individuals, there has been a desire to work more flexibly and avoid the stresses of the daily commute. A significant part of this is the move towards increased remote working and co-working.
- 3.32 Most recently, the Covid-19 Pandemic has accelerated trends and whilst it has been some time since the Government has implemented lockdown type restrictions working practices have not reverted back. There is increasing evidence that change is becoming embedded.
- 3.33 There is the potential for changes in working practices to have an influence on employment land demand in Bradford. The potential for increased adoption of remote and co-working in the future will however be reliant upon sufficiently robust infrastructure being in place. Communications infrastructure (including fast broadband and reliable mobile connectivity) is key, as are transport connections. The availability of co-working spaces is also an important consideration.
- 3.34 The shape of future employment growth in terms of sectors will also affect to what extent these changing working practices impact upon employment land requirements. For example, whilst future changes around home and remote-working may be significant in the Professional Services sector, they are less relevant to production type activities such as in the Manufacturing sector (which a major sector in terms of its scale of employment in Bradford). Similarly, there are specific distinct trends in the Manufacturing sector in space utilisation. For example, in recent years there has been a trend toward final assembly operations linked to global supply chains rather than full on-

site manufacturing. In this respect, Brexit may also have an impact on these trends going forward.

3.7 Functional Economic Market Area (FEMA)

3.35 Bradford's 2019 Bradford Core Strategy Partial Review Preferred Options report (reference 5.1.2) states that the Employment Needs Assessment and Land Review 2019 produced by Stantec sets out the evidence to justify that Bradford is a self-contained FEMA. Accordingly, the ELR assesses needs using the local authority geography.

4 Property Market Context

4.1 Overview

- 4.1 This section provides an assessment of the office and industrial property market in Bradford. The assessment has been undertaken using a range of data sources including Valuation Office Agency (VOA), EG Radius² and a survey of property agents.
- 4.2 The VOA data is only available at local authority level and is therefore presented for the whole of Bradford. EG Radius analysis is transaction-based and can therefore be mapped across the District. This data is broken down for the analysis in order to further understand activity taking place in different parts of the District.
- 4.3 As outlined in Section 3, it is recognised that the Covid-19 Pandemic has led to changes in working practices with implications for the commercial property market. This is taken in consideration in the assessment of floorspace need in Section 6.
- 4.4 It should be noted that the following section (Section 5) considers existing employment land provision and past take-up trends using the Council's latest monitoring data.

4.2 Existing employment land provision

- 4.5 The following table provides a summary of trends in total office and industrial floorspace in the period 2003-2023 using VOA data.
- 4.6 Taking timeframes since 2003 and 2013, the total quantum of both office and industrial floorspace has contracted in both instances. For office space, there has been a reduction of -13.6% since 2003 and -18.4% since 2013. For industrial space, there has been a reduction of -21.3% since 2003 and -4.7% since 2013.

Table 4.1: Total office and industrial floorspace (sqm) since 2003, Bradford

	2023	ST Change (2013-2023)			LT Change (2003-2023)		
		No.	%	Avg p.a	No.	%	Avg p.a
Office	658,000	-148,000	-18.4	-14,800	-104,000	-13.6	-5,200
Industrial	4,017,000	-199,000	-4.7	-19,900	-1,090,000	-21.3	-54,500

Source: VOA, 10/08/2023

² EG Radius brings together timely comparable data, market analysis, news & legal commentary from the commercial real estate industry, on to one integrated platform.

4.7 The following table provides a summary of the Council's monitoring data for the period 2013 to 2023. It should be noted that this data is based on planning permissions. This is different to the VOA dataset which represents a net figure (including completions and losses).

Table 4.2: Total change by use class, 2013 to 2023

	Total sqm, rounded			Change p.a., rounded		
	Net E(g) Class	Net B2 Class	Net B8 Class	E(g)	B2	B8
Bradford	30,738	55,476	33,554	3,074	5,548	3,356

Source: Bradford MDC, 2023

4.8 Tables 4.3 and 4.4 show trends in the number of rateable office and industrial properties in the District in the period 2003 to 2023. In 2003 to 2023, the number of office properties increased by 51.8% compared with a 14.7% increase in industrial properties.

Table 4.3: Total rateable properties, Office, 2003-2023

	2023	ST Change (2013-2023)		LT Change (2003-2023)	
		No.	%	No.	%
Bradford	3,780	830	28.1	1,290	51.8
Calderdale	1,790	390	27.9	800	80.8
Kirklees	2,800	420	17.6	970	53.0
Leeds	8,300	1,530	22.6	3,180	62.1
Wakefield	2,010	310	18.2	760	60.8
Yorkshire & Humber	37,030	6,400	20.9	13,800	59.4
England	415,660	75,150	22.1	147,500	55.0

Source: VOA, 10/08/2023

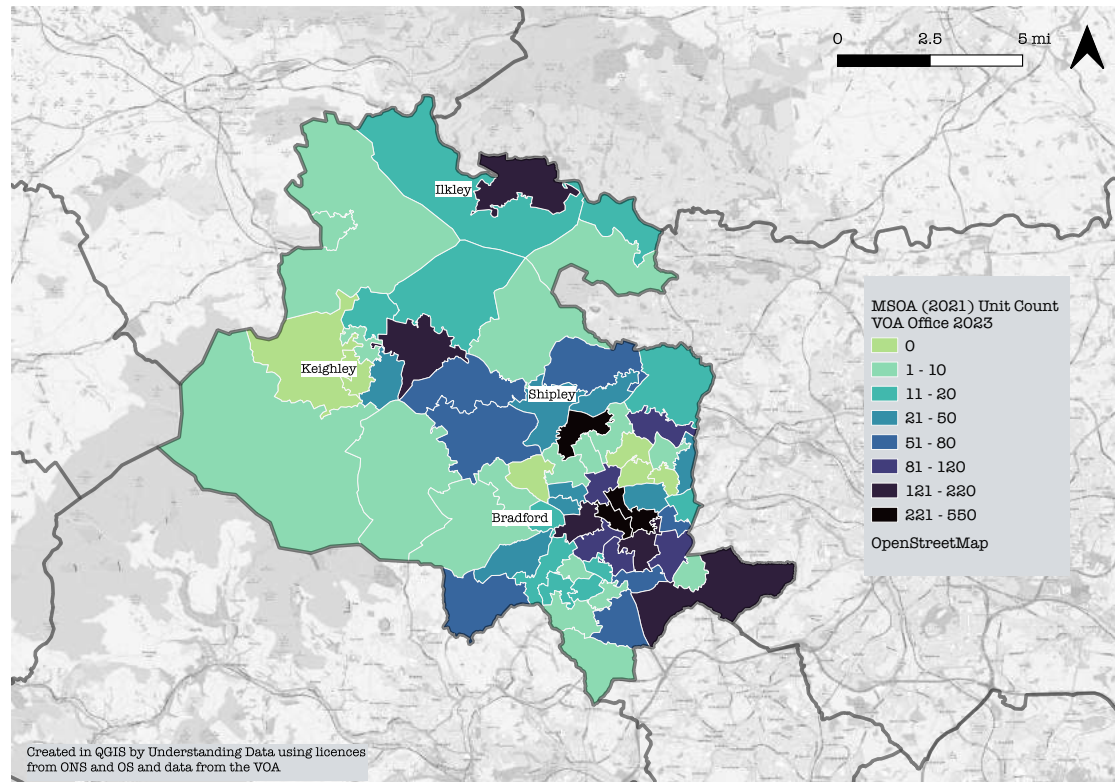
Table 4.4: Total rateable properties, Industrial, 2003-2023

	2023	ST Change (2013-2023)		LT Change (2003-2023)	
		No.	%	No.	%
Bradford	6,150	790	14.7	790	14.7
Calderdale	3,670	460	14.3	490	15.4
Kirklees	5,820	500	9.4	380	7.0
Leeds	7,910	1,930	32.3	1,270	19.1
Wakefield	3,940	970	32.7	1,010	34.5
Yorkshire & Humber	62,090	10,350	20.0	11,630	23.0
England	523,680	63,740	13.9	7,890	16.2

Source: VOA, 10/08/2023

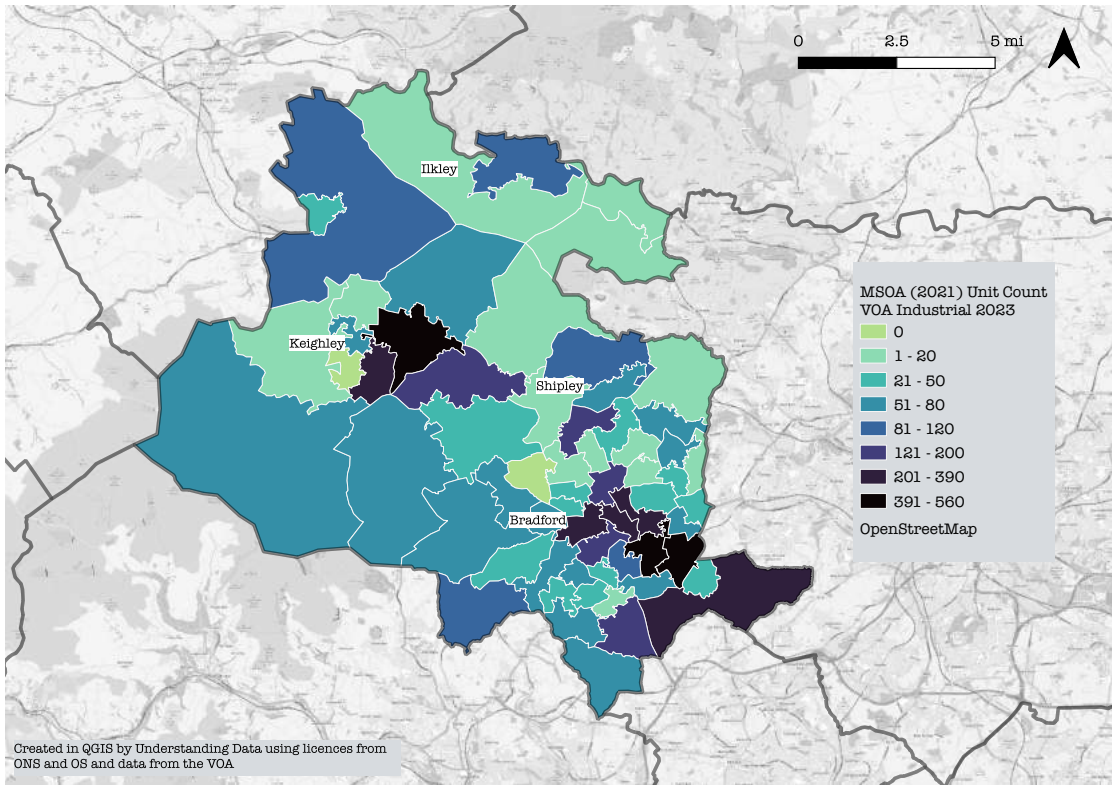
4.9 Figures 4.1 and 4.2 show the spatial distribution of rateable properties in 2023.

Figure 4.1: Total rateable properties, Office, 2023 by Middle Super Output Area (MSOA)



Source: VOA, 05/12/2023

Figure 4.2: Total rateable properties, Industrial, 2023 by MSOA



Source: VOA, 05/12/2023

4.3 Commercial market assessment

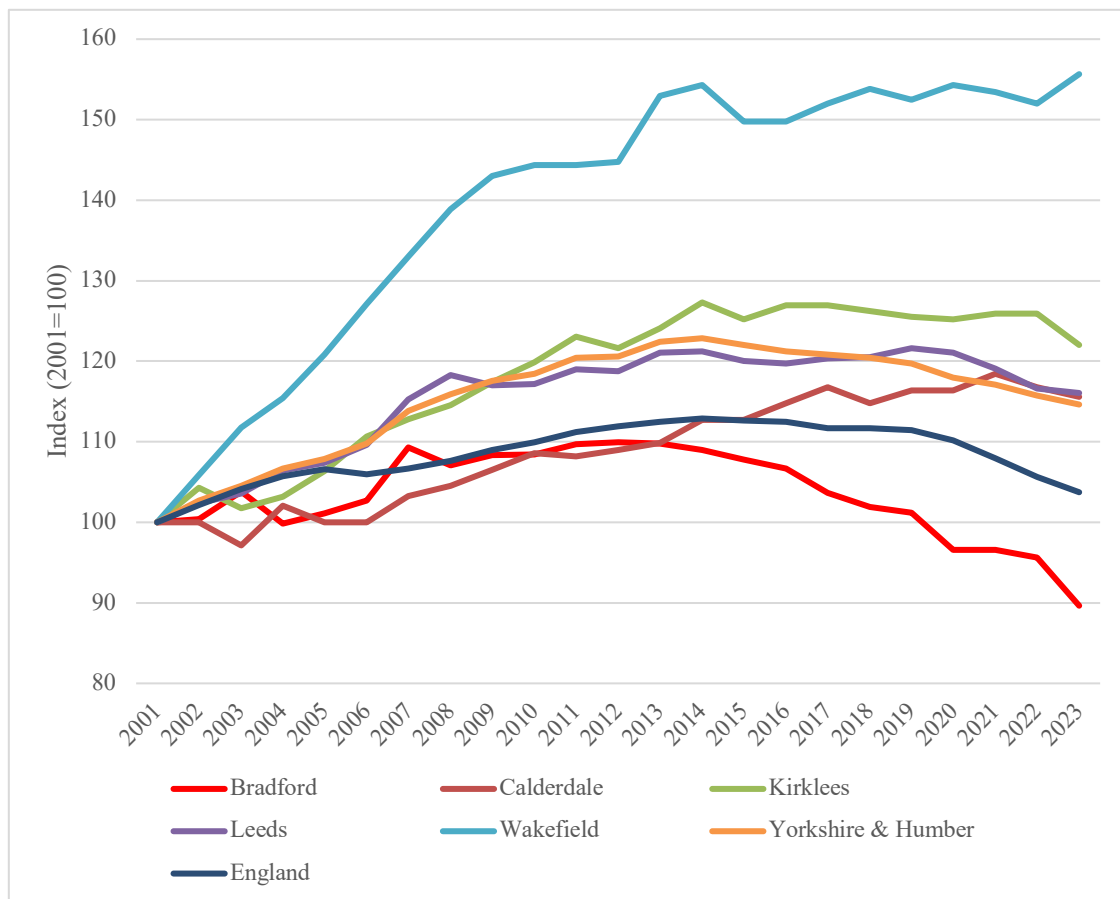
4.10 An analysis of floorspace supply, take-up, deals and availability in Bradford has been undertaken.

Office

4.11 Bradford's office market is analysed against regional and national comparators. Figure 4.3 shows the trend in office floorspace since 2001 according to VOA data.

4.12 It should be noted that comparisons between the VOA data and the Council's own data on actual completions should be treated with caution. The two datasets are collected using a different methodology. Differences in the figures may reflect that the VOA data includes changes that take place outside the planning system and which may not be captured in the Council's monitoring data. The VOA dataset represents a net figure (including completions and losses).

Figure 4.3: VOA office floorspace, 2001-2023

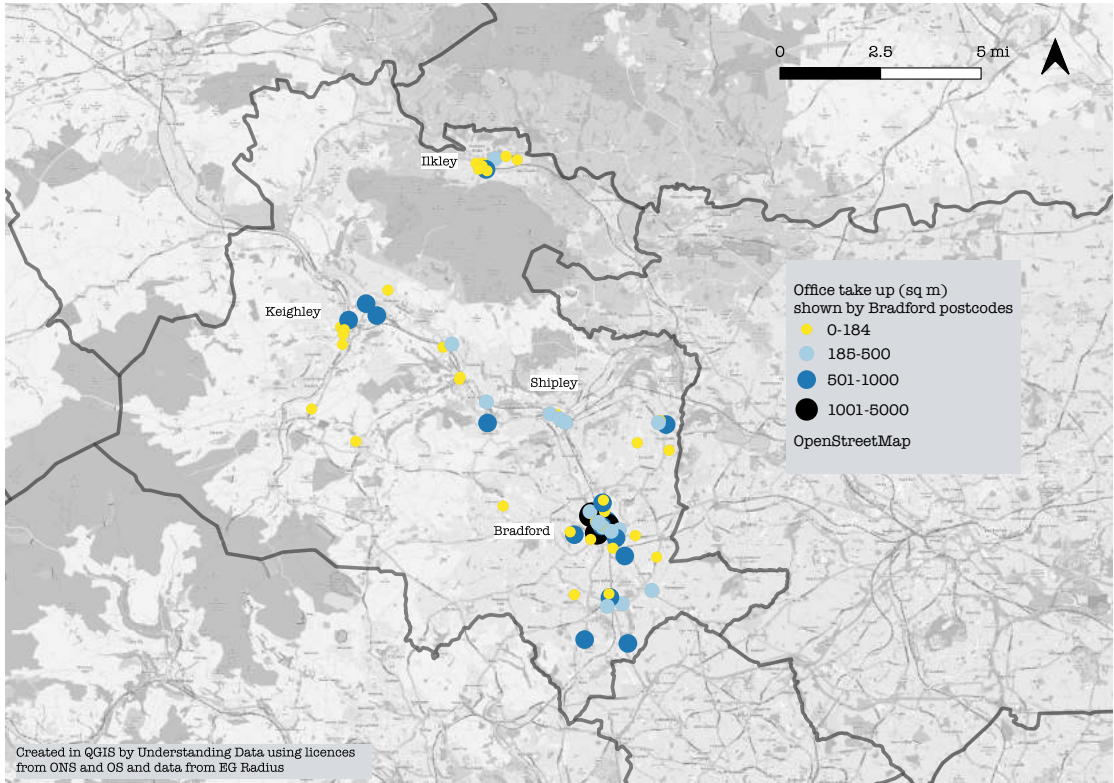


Source: VOA, 10/08/2023

4.13 According to VOA data, Bradford has seen a substantial decrease (-10.4%) in office floorspace. This trend is in contrast to that in the other West Yorkshire local authorities, wider region and nationally – which all registered increases.

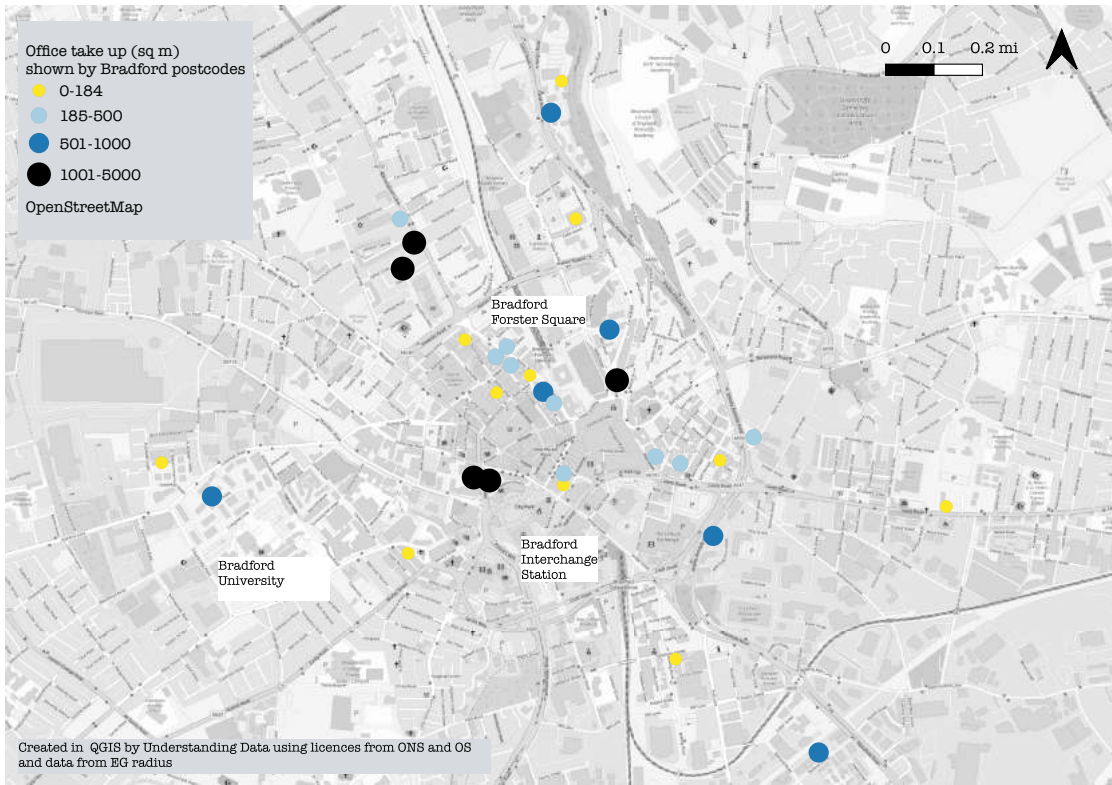
- 4.14 Of the local authorities examined, Wakefield showed by far the greatest increase in floorspace (+55.7%) with the other authorities all registering lesser but still double-digit percentage increases. At the England level, the office floorspace has been increasing more modestly (+3.8%).
- 4.15 This data also shows there has been a broad change in trend direction – with the exception of Wakefield and Calderdale, all areas experienced an upward trend in floorspace in the first half of the period followed by a downward trend in the second half. In Wakefield, the rate of increase was far less in the second half of the period than the first.
- 4.16 In the second half of the period, whilst declines in floorspace were experienced in many of the comparators, the decline in Bradford has been steeper.
- 4.17 It is noted that the 2021 Leeds City Region (LCR) Strategic Employment Study also identified that VOA data shows a decrease in the total stock of office floorspace in the City Region in 2015 to 2020, with a large proportion of this being lost in Bradford. The study notes that the change to permitted development rights in 2014 (making easier conversion of offices into residential) has had different impacts across authorities. Specifically in relation to Bradford, the study cites that despite the large loss of office space in Bradford, it was reported that a lot of this was of poor quality and did not meet occupier requirements – and therefore that the loss of space has helped to meet demand for housing without damaging the office market so far, although any further losses would increase this risk.
- 4.18 Figure 4.4 shows office take-up in Bradford District in the most recent period 2018 to 2023. There is a clear clustering of floorspace in Bradford City, particularly in terms the larger floorspace size band. Smaller clusters are present in Shipley, Keighley and Ilkley. There are also concentrations around several key road junctions (e.g. M606). Figure 4.5 shows Bradford City Centre.

Figure 4.4: Office take-up, 2018-2023



Source: EG Radius, 05/12/2023

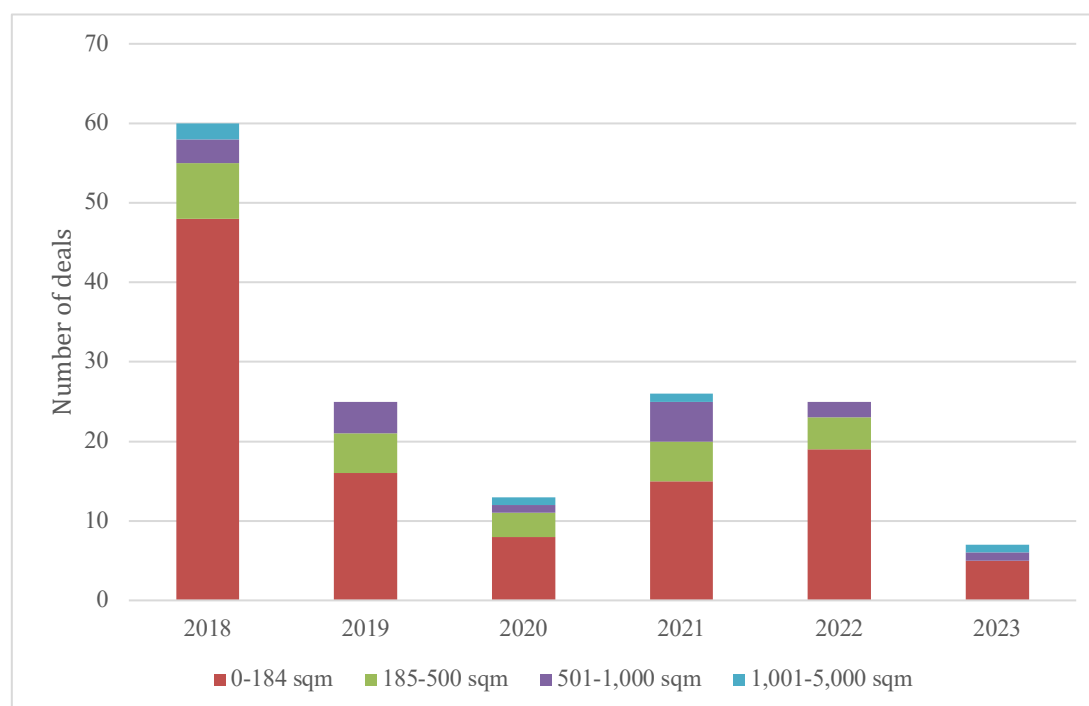
Figure 4.5: Office take-up, Bradford City Centre, 2018-2023



Source: EG Radius, 05/12/2023

4.19 Figure 4.6 shows the number of deals in Bradford District in the most recent period 2018 to 2023. In total, there are 156 transactions during this period. This equates to approximately 26 deals per annum.

Figure 4.6: Office deals by size, 2018-2023



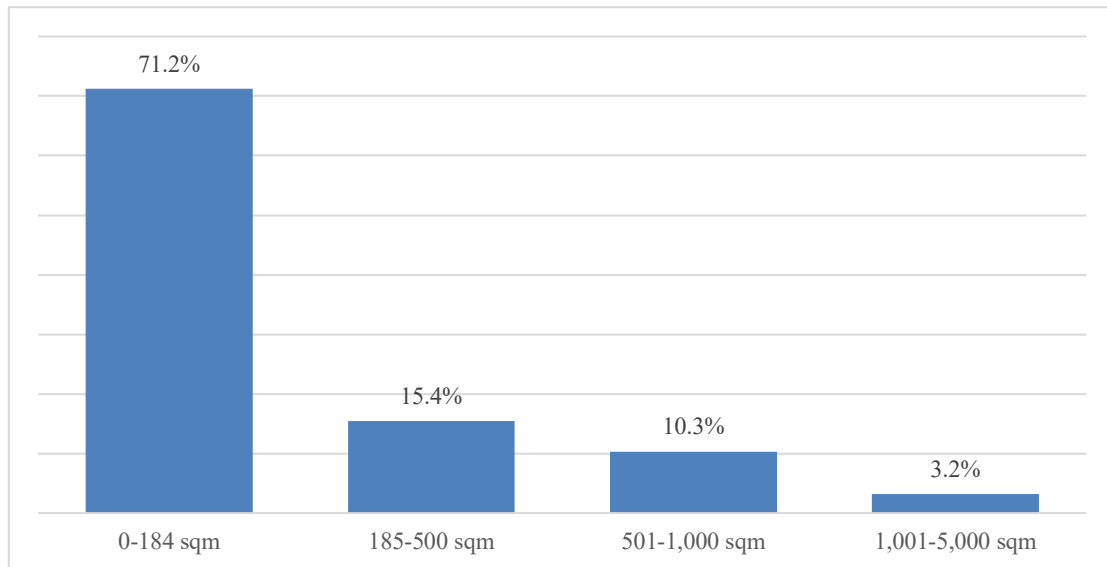
Source: EG Radius, 05/12/2023

4.20 The office market was most active in 2018, when 60 deals were recorded. The lowest number of transactions for a complete year was recorded in 2020, with only 13 transactions. The figure for 2023 (as at 05/12/2023), although not yet complete, is relatively low. It is acknowledged that there is typically a lag in deals being recorded in the database and the database is continually subject to update (it is likely that the final figure for 2023 will not be determined until further into 2024).

4.21 The number of office transactions has fluctuated significantly year to year in 2018-2023. There have been consistently lower levels since 2018 however. The drop in deals primarily relates to the smaller size band (deals under 185 sqm).

4.22 Figure 4.7 shows the total proportional split across the size bands. Over the period 2018 to 2023, more office transactions in the District involved units with sizes under 185 sqm than other size bands. Transactions involving this size of unit represented 71.2% of the total deals. A further 15.4% of transactions across the District are for office spaces between 185 and 500 sqm. Transactions of 501-1,000 sqm and 1,001-5,000 sqm represented 10.3% and 3.2% of deals respectively. There were no deals in size bands above 5,000 sqm during this period.

Figure 4.7: Office deals by size, 2018-2023



Source: EG Radius, 05/12/2023

4.23 Availability data has been analysed by looking at what is currently being advertised on the EG Radius database. This provides an indicative “point in time” snapshot of availability across Bradford as at August 2023.

Table 4.5: Number of available office units, Bradford

	Count of properties	Sum of floorspace, sqm	% of floorspace
0-184 sqm	38	2,458	3.2
185 – 500 sqm	34	10,752	13.8
501 – 1,000 sqm	7	4,768	6.1
1,001 – 5,000 sqm	9	18,790	24.1
5,000 sqm +	2	41,186	52.8
Total	90	77,954	100.0

Source: EG Radius, 10/08/2023

4.24 There are 90 office units listed on the market in Bradford, with a total floorspace of 77,954 sqm. The greatest amount of available office floorspace is held within offices over 5,000 sqm in size (52.8%). This is followed by 1,001-5,000 sqm (24.1%) and 185-500 sqm (13.8%).

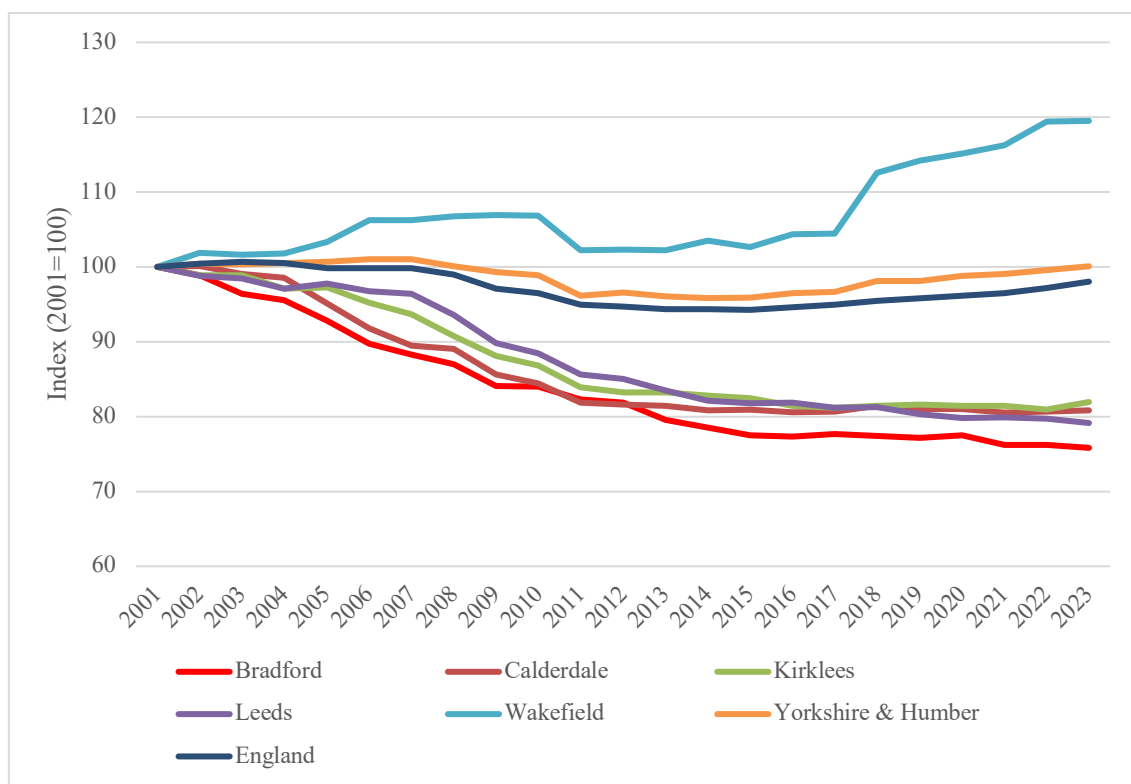
4.25 More recently, it has been confirmed that space at the new office building at One City Park will be taken up by PwC. This may strengthen the perception of Bradford City Centre as an office location.

Industrial

4.26 Bradford's industrial market is analysed against regional and national comparators. The following table shows the trend in industrial floorspace since 2001 according to VOA data.

4.27 It should be noted that comparisons between the VOA data and the Council's own data on actual completions should be treated with caution. The two datasets are collected using a different methodology. Differences in the figures may reflect that the VOA data includes changes that take place outside the planning system and which may not be captured in the Council's monitoring data. The VOA dataset represents a net figure (including completions and losses).

Figure 4.8: VOA industrial floorspace, 2001-2023



Source: VOA, 10/08/2023

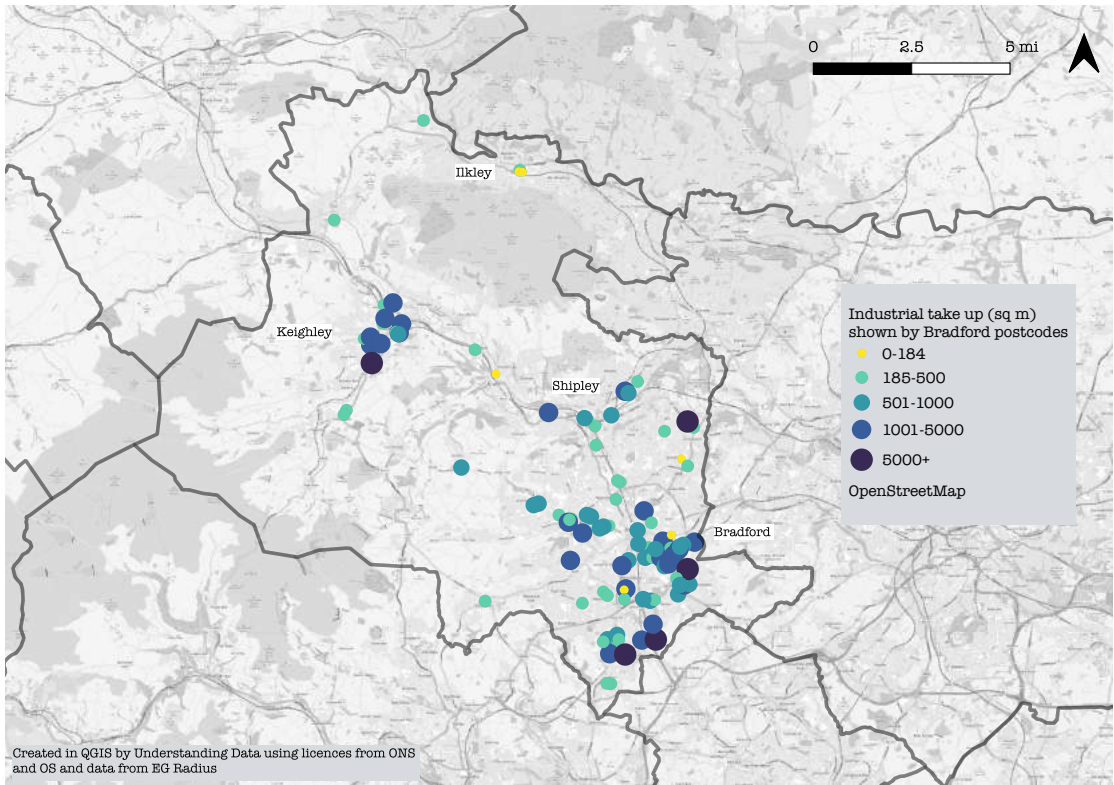
4.28 According to VOA data, Bradford has seen a substantial decrease (-24.2%) in industrial floorspace. This trend is broadly in line with that in the other West Yorkshire local authorities, with the exception of Wakefield. Of the local authorities examined, Wakefield was the only one to show an increase in floorspace (+19.5%).

4.29 At the England level, industrial floorspace declined but at a lesser rate (-2%) whilst at the regional level it was broadly unchanged.

4.30 Over the period as a whole, Leeds, Kirklees, Calderdale and Bradford have all shown a similar trend – with steeper declines in the first half of the period and a flattening out in the second half.

- 4.31 It is noted that the 2021 Leeds City Region (LCR) Strategic Employment Study identified that VOA data shows an increase in the total stock of industrial floorspace in the City Region in 2015 to 2020 but that there have been large variations between areas. The study notes that the majority of this increase was accounted for by Wakefield and by large warehousing developments rather than manufacturing space. It highlights that a number of districts in West Yorkshire have experienced a fall in industrial/warehouse space (including Bradford) but that this gives a misleading view of recent development activity as it is a net figure (including both completions and losses of industrial space). Some areas have experienced losses due to factory closures or demolition of no longer fit for purpose buildings while at the same time experiencing strong demand for new-build premises.
- 4.32 Figure 4.9 shows industrial take-up in Bradford District in the most recent period 2018 to 2023. There is a clear clustering of floorspace to the south east of the District and in Keighley.

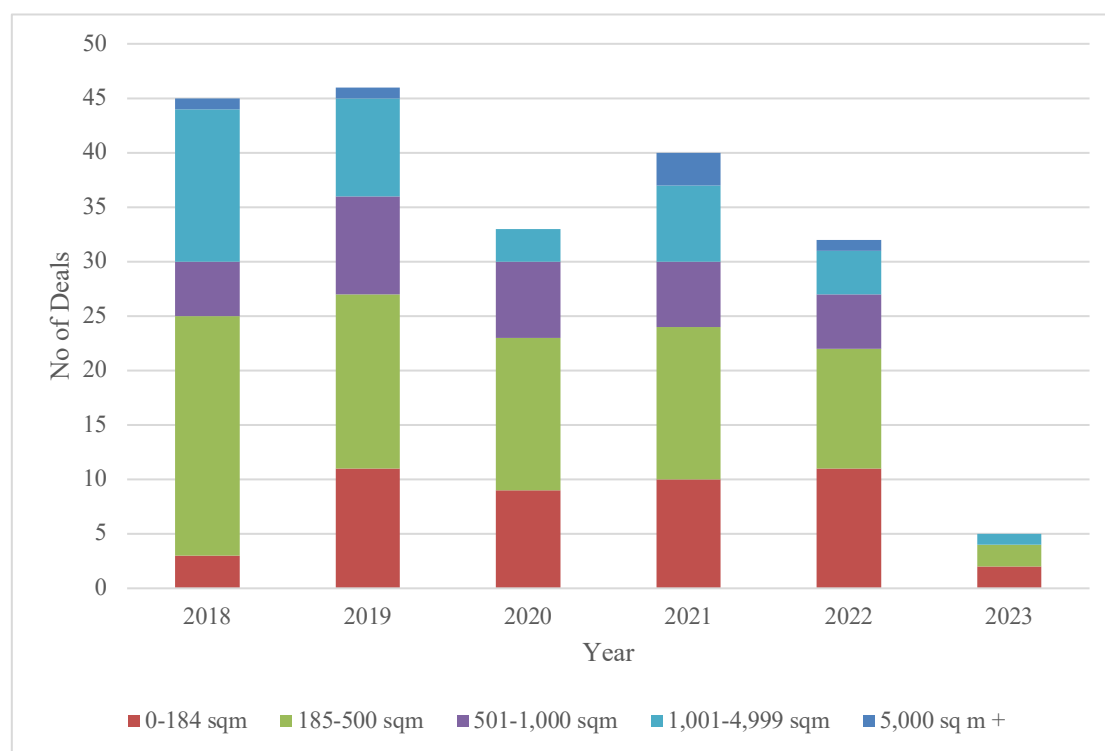
Figure 4.9: Industrial take-up, 2018-2023



Source: EG Radius, 2023

4.33 Figure 4.10 shows the number of deals in Bradford District in the most recent period 2018 to 2023. In total, there are 201 transactions during this period. This equates to approximately 34 deals per annum.

Figure 4.10: Industrial deals by size, 2018-2023



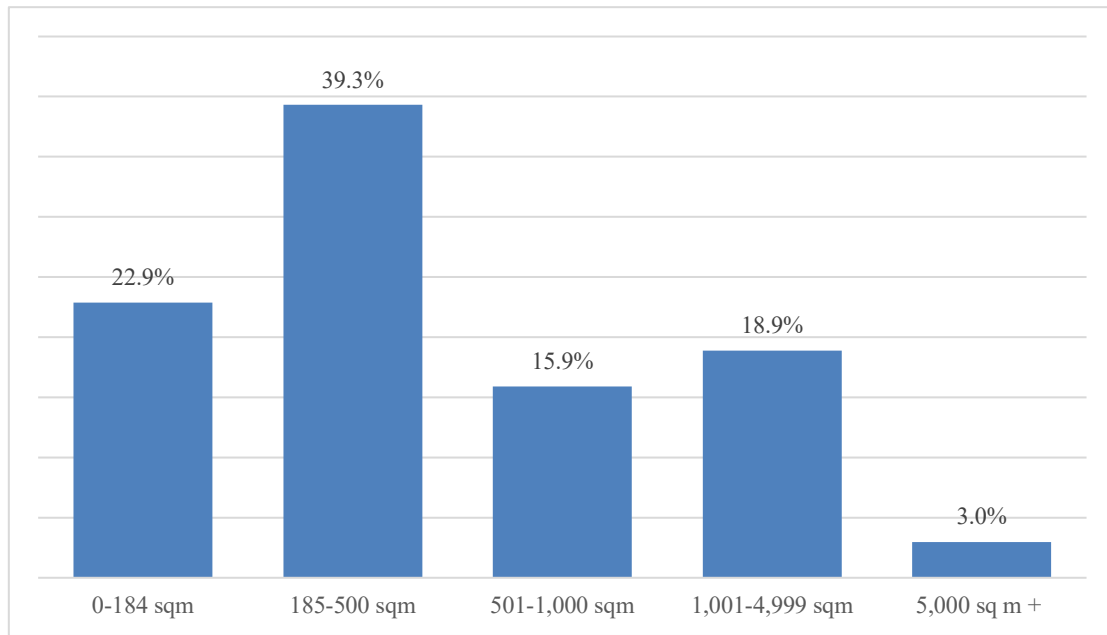
Source: EG Radius, leases, 05/12/2023

4.34 The industrial market was most active in 2019, when 46 deals were recorded. The lowest number of transactions for a complete year was recorded in 2022, with 32 transactions. The figure for 2023 (as at 05/12/2023), although not yet complete, is relatively low. It is acknowledged that there is typically a lag in deals being recorded in the database and the database is continually subject to update (it is likely that the final figure for 2023 will not be determined until further into 2024).

4.35 The number of industrial transactions has fluctuated significantly year to year in 2018-2023 but always above the 30 deals level (with the exception of 2023 which is not a complete year of data).

4.36 Figure 4.11 shows the total proportional split across the size bands. Over the period 2018 to 2023, more industrial transactions in the District involved units with sizes of 185-500 sqm than other size bands. Transactions involving this size of unit represented 39.3% of the total deals. A further 22.9% of transactions across the District are for industrial spaces between 0-184 sqm. Transactions of 1,001-4,999 sqm and 501-1,000 sqm represented 18.9% and 15.9% of deals respectively. There were 6 deals above 5,000 sqm during this period (3.0% of total deals).

Figure 4.11: Industrial deals by size, 2018-2023



Source: EG Radius, leases, 05/12/2023

4.37 Availability data has been analysed by looking at what is currently being advertised on the EG Radius database. This provides an indicative “point in time” snapshot of availability across Bradford as at August 2023.

Table 4.6: Number of available industrial units, Bradford

	Count of properties	Sum of floorspace, sqm	% of floorspace
0-184 sqm	8	797	0.5
185 – 500 sqm	22	7,396	5.0
501 – 1,000 sqm	14	9,425	6.3
1,001 – 5,000 sqm	21	44,240	29.7
5,000 sqm +	10	87,025	58.5
Total	75	148,881	100.0

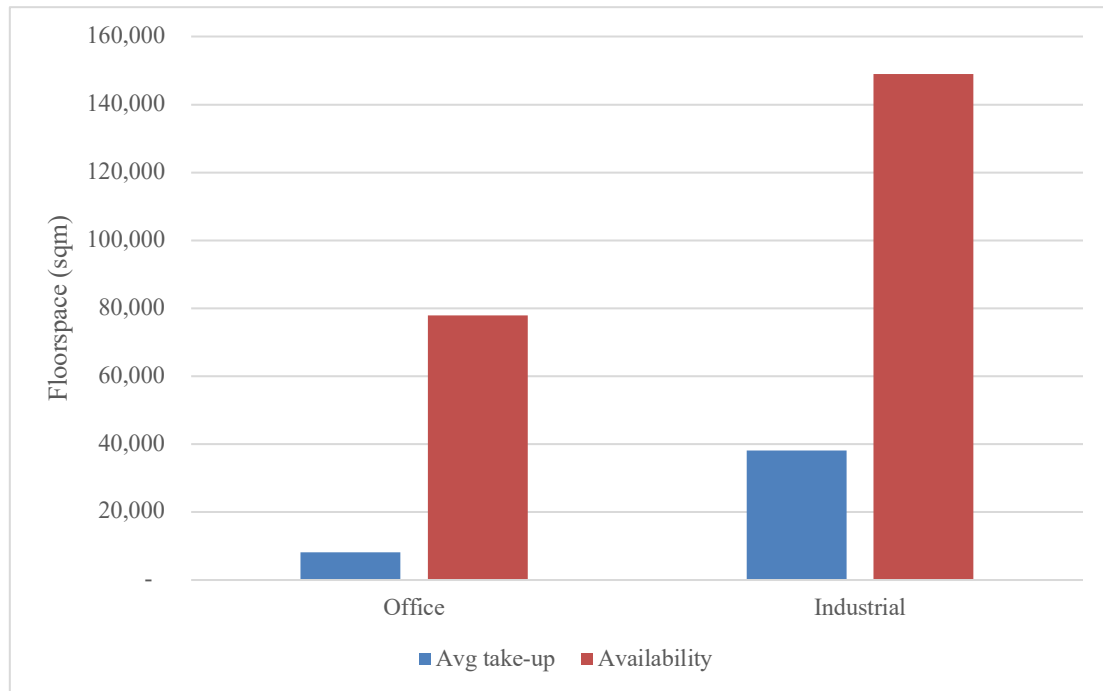
Source: EG Radius, 2023

4.38 There are 75 industrial units listed on the market in Bradford, with a total floorspace of 148,881 sqm. The greatest amount of available industrial floorspace is within units over 5,000 sqm in size (58.5%). This is followed by 1,001-5,000 sqm (29.7%). Smaller unit size bands account for a much smaller proportion of availability.

4.4 Years supply of commercial floorspace

4.39 An estimate of years supply of commercial floorspace can be calculated by considering average annual take-up and current availability – as shown in Figure 4.12.

Figure 4.12: Estimated years supply



Source: EG Radius, 2023

4.40 The analysis suggests 9.5 years of supply for office floorspace in the District. This suggests a good current supply of office properties in the local market. For industrial properties, there is 3.9 years of supply which indicates a moderate supply for the current need. This suggests that the Council needs to continue supporting the industrial property market.

4.5 Survey findings

4.41 In addition to the desk-based analysis, engagement with local property agents has been a key part of the work. This engagement took the form of an online survey. The key findings of this engagement were as follows:

- All respondents described the market for employment land/properties in Bradford as ‘strong’, and the majority the market in the Yorkshire & Humber region as whole;
- All respondents described the impact of the Covid-19 Pandemic on demand for properties in Bradford as ‘strong’;
- Over 70% of respondents expected the employment land market to ‘strengthen’ over the next five years, with around 30% expecting it to ‘weaken’;
- In terms of the industry sector of occupiers seeking employment properties, all respondents identified the Manufacturing and Transport & Logistics sectors. The majority of respondents also cited the Construction, Wholesale and Retail & eCommerce sectors;

- Several respondents identified industrial property as a particular form of demand which is currently not being sufficiently met;
- The majority of respondents identified the 186-500 sqm size range as attracting the most demand from occupiers. Several also identified the 0-185 sqm and 1,001-5,000 sqm ranges. No respondents identified units larger than 5,000 sqm as attracting the most demand;
- Proximity to key traffic corridors (e.g. motorways) was the most cited characteristic that occupiers were looking for. Several agents also identified proximity to industrial parks/estates, storage space availability and the land parcel/plot size of the property as being key factors. In addition, several agents cited height as a key factor that occupiers were looking for (e.g. for high bay units, distribution uses);
- The majority of agents expected rents to increase by 0-5% in the next twelve months, with the remainder expecting flat rents or a 0-5% fall;
- The majority expressed the view that there was a major shortfall in the supply of employment property/land with the remainder identifying a moderate shortfall or balance. No agents identified an oversupply;
- Where agents viewed that there was a shortfall in supply, the main cited reasons were insufficient site allocations in the Local Plan and Green Belt policy constraints. Losses to other uses (e.g. housing) were also mentioned to a lesser extent;
- In cases where there is over-supply, agents identified unfit stock as the main cause; and
- Some agents said that further land allocations, including focused around the M606 were required to meet needs that are not currently being met.

5 Employment Land Supply

5.1 Overview

- 5.1 This section presents the findings of an assessment of employment land supply in the Bradford District. It considers the characteristics and quality of existing allocated employment sites in the District and their suitability to meet future employment development needs as well as other extant planning permissions and windfall sites. The assessment has been undertaken by the Council.
- 5.2 Where there have been applications permitted which include an intensification of an existing employment site, i.e. an extension or additional floor to an existing employment building, only net additional floorspace is recorded as the site area already exists and would be misrepresentative. Therefore, these have been recorded as 0 hectares towards the supply.
- 5.3 Windfall sites are defined in the National Planning Policy Framework (NPPF) as ‘Sites which are not specifically identified in the development plan’, i.e. they are sites which are not allocated.
- 5.4 This section covers:
- Most recent take up and loss data for 2022/2023;
 - Existing allocated employment sites;
 - Other potential sites feeding into future employment land supply; and
 - Summary of employment land availability; and
 - Key conclusions.
- 5.5 A separate sites assessment document produced by the Council sits alongside this ELR document. This contains the full site assessment method and detailed site assessments.

5.2 Take Up/Loss between 1st April 2022 and 31st March 2023

Take Up

- 5.6 As shown in Table 5.1, between 1st April 2022 and 31st March 2023, 8 sites were developed for employment purposes. There was an additional 0.39 hectares (net) and an additional 2,614 square metres (net) of floorspace developed. Of the 8 sites developed, one site was allocated (BS/E1.23) in the RUDP.

Table 5.1: Employment land take up (net), 2022-2023

No. of sites	Net take up (Ha)*	Sqm take up (net), by use class					Total sqm take up (net)
		E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	
8	0.39	43	0	0	2,486	85	2,614

*Please note, some sites are recorded as 0 net take up as the development is an intensification of an existing employment site.

Losses

5.7 As shown in Table 5.2, between 1st April 2022 and 31st March 2023, 4 employment sites were developed for alternative uses. This resulted in a loss of 0.27 hectares (net) and a loss of 1,346 square metres (net) of floorspace.

Table 5.2: Employment land losses (net), 2022-2023

No. of sites	Net loss (Ha)*	Sqm loss (net), by use class					Total lost sqm (net)
		E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	
4	0.27	-991	0	0	-355	0	-1,346

*Please note, some sites are recorded as 0 net take up as the development is an intensification of an existing employment site.

Net take up/losses

5.8 Reviewing both take up and losses, 12 sites were developed impacting on employment development.

5.9 Please note, this is the first year that losses have been recorded, impacting on the overall net take up figure. Table 5.3 shows there was an overall additional 0.12 hectares (net) and an additional 1,268 square metres (net) floorspace developed.

Table 5.3: Net employment land, 2022-2023

No. of sites	Net take up (Ha)*	Sqm take up/loss (net), by use class					Total sqm take up (net)
		E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	
12	0.12	-948	0	0	2,131	85	1,268

*Please note, some sites are recorded as 0 net take up as the development is an intensification of an existing employment site.

5.3 Existing allocated employment sites

5.10 There are currently several Development Plan Documents which allocate sites for employment purposes; the Replacement Unitary Development Plan (RUDP), the Bradford City Centre Area Action Plan (AAP) and the Shipley and Canal Road Corridor AAP.

- 5.11 There are 87 sites allocated in the RUDP (Policy E1), five sites allocated in the Adopted Bradford City Centre AAP (Policy CBLB1 and Policy GN1) and four sites in the Adopted Shipley and Canal Road Corridor AAP (Policy SCRC/SH1 and Policy SCRC/CS1) However, of the nine sites allocated in the adopted AAPs, only two are solely for employment purposes (B/1.2 and B/1.3), the other seven are mixed-use sites which include office.
- 5.12 All sites were reviewed as part of the emerging new Local Plan for the publication of Regulation 18 Preferred Options.
- 5.13 Of the 87 sites from the RUDP which have not been developed, 13 were deemed still suitable for re-allocation for employment purposes (Policy EC1 of the Preferred Options Local Plan) with a total capacity of 30.65 hectares. These were sites where new employment development could contribute towards the emerging Local Plan requirement. One site (BN/E1.17) is now under construction and two sites (BS/E1.14 and BS/E1.21) have extant planning permission but are yet to commence. A further three RUDP sites now have extant planning permission but were not re-allocated at Regulation 18 (see below). These however, still form part of the supply:
- BS/E1.2 – re-allocated for Housing (Policy HO1)
 - BN/E1.3 – Intensification of an existing employment site
 - BW/E1.17 - Superseded by Waste Management DPD
- 5.14 22 sites were de-allocated for several different reasons, including:
- they were already in employment use,
 - they were classed as intensification sites and would not contribute new take up,
 - were open space sites,
 - the remaining areas were below the Regulation 18 Local Plan threshold (0.25 hectares). The threshold is being reviewed as part of the Regulation 19 site assessment process and therefore may change, or
 - other development had already taken place for alternative uses (e.g., housing or retail).
- 5.15 10 sites (totalling 18.78 hectares) were re-allocated for housing (Policy HO1 of the Preferred Options Local Plan).
- 5.16 Of the nine sites from the two AAPs, three were deemed suitable for re-allocation for employment purposes (Policy EC1 of the Preferred Options Local Plan) with a total capacity of 2.37 hectares. One site (B/1.2 – One City Park) is currently under construction³.
- 5.17 Please note, all sites are currently under review as part of the emerging new Local Plan for the publication of Regulation 19 Submission.

³ Supply figures dated at 31st March 2023. One City Park complete at publication date.

Table 5.4: Breakdown of availability (ha) on existing allocated employment sites

DPD	Original no. of Sites	No. of sites assessed as suitable at Reg 18 LP*	Total hectares at Reg 18 LP	Total hectares excluding permissions at Reg 18 LP****
RUDP	87	13****	30.65	25.58
Bradford City Centre AAP	5**	3	2.37	1.96
Shipley and Canal Road Corridor AAP	4***	0	0	0
Total	96	16	33.02	27.54

* All sites are currently under review as part of Regulation 19.

** Two for employment purposes and three are mixed use sites.

*** All sites are mixed use.

**** Sites which have not been developed were assessed.

***** To avoid double counting, this figure counts towards the supply.

Table 5.5: Location of existing allocated employment sites deemed still suitable

Settlement	No. of sites	Hectares
Bingley	1	0.50
Bradford City Centre	3	2.37
Bradford North West	1	4.13
Bradford South East	8	18.67
Bradford South West	1	3.25
Keighley	2	4.1
Total	16	33.02

5.4 Other potential sites feeding into future employment land supply

Regulation 18 Preferred Options Local Plan (2021)

5.18 To meet the employment land need set out in Policy SC6 of the Regulation 18 Preferred Options Local Plan (2021) and deliver economic growth and support jobs within the District, 26 employment land sites (totalling 87.45 hectares) were identified and allocated on the Policies Map (Policy E1).

5.19 As stated earlier, 13 sites, totalling 30.65 hectares were formally allocated in the RUDP and were carried over (re-allocated). 3 sites, totalling 2.37 hectares were formally allocated in the Bradford City Centre AAP and were carried over (re-allocated).

5.20 Therefore, 10 sites, totalling 54.43 hectares are new sites identified through the Regulation 18 Local Plan. Of which, one site (4.9 hectares) now has

extant planning permission and excluded from Table 5.6 to avoid double counting as its included as a windfall site below.

Table 5.6: Location of new (additional) employment sites identified through the Regulation 18 Local Plan with no planning permission

Settlement	No. of sites	Hectares
Bingley	1	1.18
Bradford North East	2	31.55
Bradford South East	4	13.59
Bradford South West	1	0.52
Steeton with Eastburn	1	2.69
Total	9	49.53

Planning permissions and windfalls

5.21 At 31st March 2023, there were 81 sites (16 of which are under construction) with extant planning permission (commitments) which included either additional take up or loss of employment land (Use Class E(g)(i)(ii)(iii), B2 or B8).

5.22 Of the 81 commitments, 58 include additional employment take up and 21 include a loss of employment. There are two windfall sites with no change to the overall figures (not shown in take up or loss table below); one was for change of use between B Use Classes, and one was for internal alterations.

Take Up

5.23 The 58 sites with additional employment take up equates to 18.83 hectares (net) and 88,839 square metres (net) floorspace. Of which 11 are under construction (3 allocated and 8 windfalls) and 47 (5 allocated and 42 windfalls) have not started.

Table 5.7: Breakdown of sites with extant planning permission (take up)

No. of sites	Net take up (Ha)*	Net take Up (sqm), by use class					Total committed net take up (sqm)
		E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	
3 U/C	4.91	7,877	0	223	11,357	0	19,457
5 Not Started	1.75	456	83	83	4,062	250	4,934
8 Allocated	6.66	8,333	83	306	15,419	250	24,391
8 U/C	1.7	670	210	1,970	2,052	2,630	7,532
42 Not Started	10.47	3,775	2,556	10,630	20,016	20,239	56,916
50 Windfalls	12.17	4,445	2,466	12,600	22,068	22,869	64,448
58 Total	18.83	12,778	2,549	12,906	37,487	23,119	88,839

*Please note, some sites are recorded as 0 net take up as the development is an intensification of an existing employment site.

Losses

5.24 The 21 sites with a loss of employment equates to -1.71 hectares (net) and -15,742 square metres (net) floorspace. All are windfall sites, 3 are under construction and 18 have not started.

Table 5.8: Breakdown of sites with extant planning permission (Loss)

No. of sites	Net take up (Ha)*	Net take Up (sqm), by use class					Total committed net take up (sqm)
		E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	
3 U/C	-0.35	-1,814	0	-564	0	0	-2,378
18 Not Started	-1.36	-5,803	942	-3,996	-998	-3,509	-13,364
21 Total	-1.71	-7,617	942	-4,560	-998	-3,509	-15,742

*Please note, some sites are recorded as 0 net take up as the development is an intensification of an existing employment site.

Overall net take up/loss

5.25 Of the 81 commitments, 8 sites are currently allocated (7 RUDP and 1 AAP), totalling 6.66 hectares (net). The remaining 73 are windfall sites, totalling 10.46 hectares (net) located around the district.

Table 5.9: Breakdown of sites with extant planning permission (net)

No. of sites	Gross take up (Ha)*	Net take up (Ha)	Net take Up (sqm), by use class					Total committed net take up (sqm)
			E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	
Allocated Sites								
3 U/C	4.91	4.91	7,877	0	223	11,357	0	19,457
5 Not Started	1.75	1.75	456	83	83	4,062	250	4,934
8 Allocated	6.66	6.66	8,333	83	306	15,419	250	24,391
Windfalls								
13 U/C	1.7	1.35	-1,144	210	1,406	2,353	2,329	5,154
60 Not Started	10.47	9.11	-2,028	3,198	6,634	19,018	16,730	43,552
73 windfalls	12.17	10.46	-3,172	3,408	8,040	21,371	19,059	48,706
81 total	18.83	17.12	5,161	3,491	8,346	36,790	19,309	73,097

*Please note, some sites are recorded as 0 net take up as the development is an intensification of an existing employment site.

5.5 Summary of employment land availability

5.26 Table 5.10 illustrates the current (at 31st March 2023) breakdown of the different components and use classes of employment land availability (hectares) to count towards Bradford Districts supply figure. To avoid double counting, allocated sites with planning permission are counted in the commitments section.

5.27 Please note, the table does not include any previous take up figures (i.e., completions from previous years). Once the base date of the new Local Plan is determined, there may be additional supply from previous years.

Table 5.10: Breakdown of employment land availability (supply), at 31st March 2023

	Hectares (net)	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8
RUDP*	25.58	0	0	0	17.91	7.67
AAP*	1.96	1.96	0	0	0	0
Regulation 18 Local Plan**	49.53	25.49	0	0	15.13	8.90
Commitments on allocated sites at 31.03.23	6.66	0.58	0.05	0.42	5.45	0.15
Windfall commitments at 31.03.23	10.46	0.03	0.37	2.40	3.48	4.17
Total***	94.19	28.06	0.42	2.82	41.97	20.89

*The sites in the current DPD (RUDP and AAPs) were assessed for the Regulation 18 Local Plan. This figure indicates which sites are still deemed suitable and to be re-allocated in the new Local Plan and does not include site with planning permission to avoid double counting. Note, these are to be re-appraised as part of the Regulation 19 site assessment process and therefore may change.

**Remaining (new) sites which were allocated at Reg 18, removing the RUDP and AAP sites to avoid double counting. Note, these are to be re-appraised as part of the Regulation 19 site assessment process and therefore may change.

***Total figure slightly larger than use class figures due to rounding.

5.28 Table 5.11 provides a locational breakdown of the of the land available for E(g)/B-class uses (at 31st March 2023). As can be seen, there is significantly more land available in Bradford South East and Bradford North East. There are some areas of decline due to commitments.

Table 5.11: Location breakdown of employment land availability (supply), at 31st March 2023

Settlement	Hectares (Net)	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8
Bradford SE	39.23	7.35	0.10	1.21	20.18	10.38
Bradford NE	37.15	18.43	0.08	0.08	12.51	6.03
Bradford SW	7.15	0.20	0.20	1.29	3.33	2.13
Keighley	5.02	0.01	0.03	0.23	3.22	1.53
Steeton with Eastburn	2.69	0.00	0.00	0.00	1.88	0.81
Bradford City Centre	2.31	2.31	0.00	0.00	0.00	0.00
Bingley	1.60	-0.08	0.00	0.00	1.18	0.50
Burley in Wharfedale	-0.01	-0.01	0.00	0.00	0.00	0.00
Ilkley	-0.02	-0.02	0.00	0.00	0.00	0.00
Bradford NW	-0.20	0.13	0.00	0.00	-0.33	0.00
Shipley	-0.33	-0.33	0.00	0.00	0.00	0.00
Canal Road AAP	-0.46	0.01	0.01	0.01	0.01	-0.49
Total*	94.13	28.01	0.42	2.82	41.97	20.89

*Total figure different to Table 5.10 due to rounding.

5.6 Conclusions

- 5.29 The existing allocations (Appendix 2) were assessed as part of the Regulation 18 Preferred Options Local Plan to determine which unimplemented sites from the RUDP and two AAPs are still suitable and deliverable for employment purposes and therefore re-allocated. The Assessment recommended several sites in their current form to be deallocated or re-allocated for alternative uses, such as housing. Several new sites were also allocated as part of the Regulation 18 Preferred Options Local Plan. No sites from the Shipley and Canal Road Corridor AAP were re-allocated for employment.
- 5.30 There was a net loss (-948 sqm) of office space (Use Class E(g)(i)) between 1st April 2022 and 31st March 2023. Please note, this is the first year that losses have been included in the monitoring of employment land.
- 5.31 Furthermore, there is an overall net take up (5,161 sqm) of office with extant planning permissions. However, there would be a net loss of office if the development of One City Park (AAP allocation: B/1.2) had not progressed.
- 5.32 The latest supply position illustrates there is a suitable number of sites with a healthy capacity (94.19 hectares) of employment land availability. However, 49.53 hectares of the supply is made up of new sites identified through the Regulation 18 Local Plan, there may be other suitable sites which can contribute towards a different requirement at Regulation 19. All sites, including previously rejected sites and any new sites will be re-assessed as part of the Regulation 19 Local Plan (Submission) site assessment process and therefore may change. Some sites which were rejected at Regulation 18 have been resubmitted through the Call for Sites process and may now be suitable as additional information has been supplied.

6 Future Requirements for Employment Land

6.1 Overview

- 6.1 This section assesses the total requirement for additional employment space in Bradford in the period 2023-2041. The assessment considers demand across industrial sectors making up the economy and the implications in terms of the types of E(g)/B-class use space required.

6.2 Approach

- 6.2 There are broadly three main forecasting techniques that can be used to forecast employment land requirements. These are:

- **Labour demand forecasts** – based on an economic model, these predict changes in employment by sector;
- **Labour supply forecasts** – these take demographic dynamics as the driver and forecast changes in employment; and
- **Projections of past take-up** – these roll forward trends in past take-up of employment land and floorspace.

- 6.3 There are advantages and disadvantages associated with each:

- Labour demand forecasts can be useful in understanding expected future changes in the scale and sectoral composition of employment. They are inherently limited however by their strong reliance upon past trends to drive econometric forecasting models.
- Labour supply-based techniques have similar advantages and disadvantages.
- Projecting forward on the basis of past take-up has the advantage of utilising available historic evidence on actual realised market demand. The disadvantage with this approach however is that projecting take-up rates forward on a linear basis assumes that the property market and economy will continue to behave as it has in the past, and that demand is not constrained or subject to change by other factors. This is a significant constraint in terms of establishing an informed view of future demand.

- 6.4 Reflecting this, several economic scenarios have been developed in the ELR to provide a robust framework for considering future E(g)/B-class employment space requirements. A blended approach is applied considering labour demand, labour supply and historic take-up. This is supplemented by market intelligence and engagement with local agents and businesses.

- 6.5 The advantage of this approach is that it enables both market conditions and the expected impacts of economic development policy to be taken into account. Overall, the approach is based on the consideration of a range of

evidence, both quantitative and qualitative, in order to inform the development of alternative scenarios for future growth.

6.6 This approach is consistent with Planning Practice Guidance (PPG)⁴ that states that Plan makers should develop an idea of future needs based on a range of data such as:

- Sectoral and employment forecasts and projections (labour demand);
- Demographically derived assessments of future employment needs (labour supply techniques);
- Analyses based on the past take-up of employment land and property and/or future property market requirements; and
- Consultation with relevant organisations, studies of business trends and an understanding of innovative and changing business models, particularly those which make use of online platforms to respond to consumer demand.

6.7 PPG also highlights that Authorities will need to take account of longer-term economic cycles in assessing this data, and consider and plan for the implications of alternative economic scenarios. Our approach responds to this by examining a range of scenarios.

6.8 In interpreting the results of the analysis, it is important to note that not all employment growth or contraction will automatically lead to an immediate increase/decrease in floorspace requirements. There will typically be some spare capacity in the system (for example, some firms may be able to alter their staff levels to a degree without changing the scale of their premises).

6.9 Further, the judgement on the level of need that CBMDC should plan for does not only have a quantitative aspect. There are a number of qualitative factors which must also be taken into consideration (as highlighted throughout the ELR) – for example market intelligence and the results of consultation with local businesses and other stakeholders.

6.3 Econometric forecasts (labour demand)

Employment growth scenarios

6.10 The latest econometric forecasts provide an up-to-date assessment of the potential path of employment growth in Bradford to 2041. Two recent forecasts have been obtained for the ELR:

- Oxford Economics (January 2023); and
- Experian REM (December 2022).

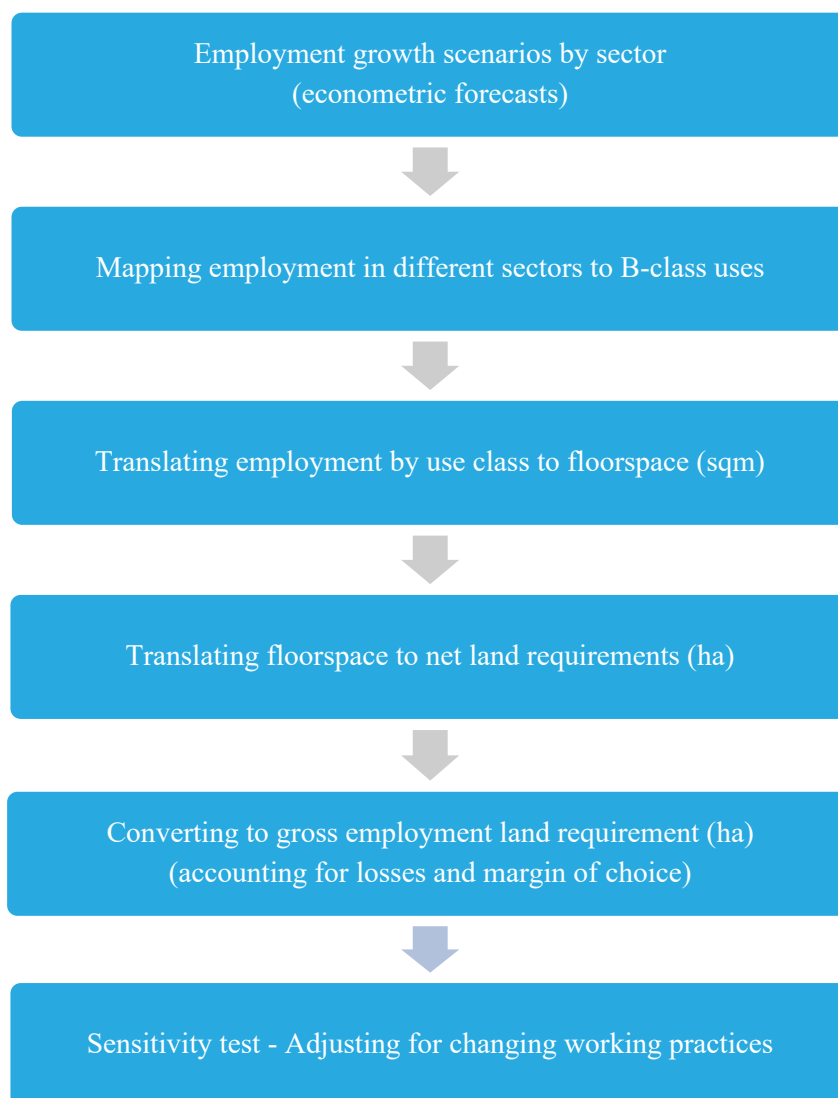
6.11 The period 2023-2041 is considered for the purposes of the ELR.

⁴ Based on PPG Housing and economic needs assessment, Paragraph: 027 Reference ID: 2a-027-20190220.

6.12 The two econometric forecasts represent baseline forecasts of employment growth. It is recommended that the REM model be treated as the most appropriate source of econometric forecasts. The REM model is bespoke to the Yorkshire region and its use is widely accepted in economic policy work and employment land policy matters.

6.13 Figure 6.1 illustrates the key stages of the approach to estimating the future requirement for employment space using the forecasts. This process requires a number of detailed assumptions in order to convert forecasts of growth in jobs across different industrial sectors to employment floorspace and land requirements. Further detail on the assumptions applied is provided in the Appendix 1.

Figure 6.1: Approach to assessing land requirements



Source: Edge (2023).

6.14 In order to consider a range of potential outcomes for growth, two higher growth scenarios are also analysed in this ELR. These are based on the findings of the Employment Growth Paper (EGP) in relation to employment

growth potential. Table 6.1 sets out these scenarios and their respective implications for annual average employment change in the plan period.

6.15 The mid-point of the two higher growth scenarios is also illustrated.

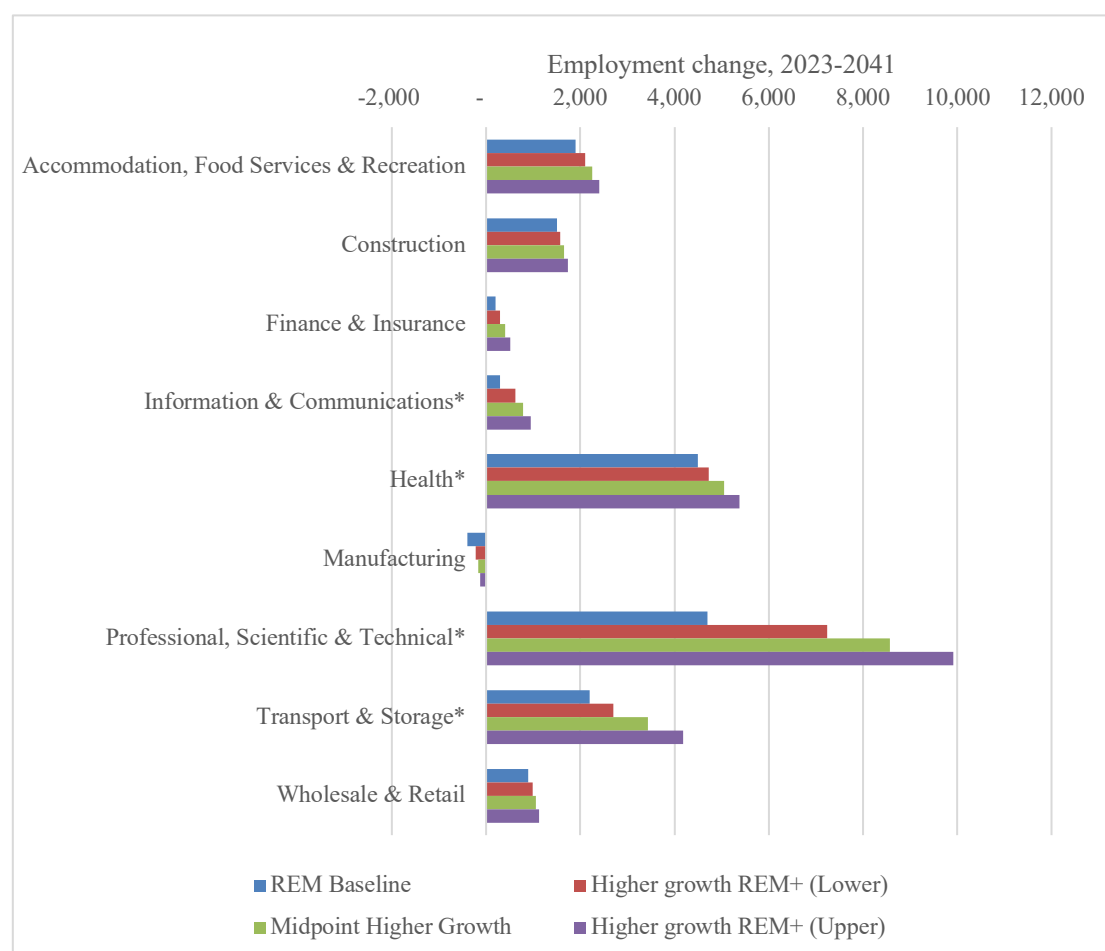
Table 6.1: Scenarios based on econometric forecasts

Scenario	Change in total employment, 2023-2041
	Annual average
Baseline forecast (REM)	1,111
Higher growth scenario REM+ (Lower)	1,346
Mid-point - Higher Growth Scenario	1,514
Higher growth scenario REM+ (Upper)	1,682

Note – REM refers to the REM forecast (December 2022). Total workforce jobs.

6.16 For the two higher growth scenarios, additional employment growth is included in several sectors of the economy based on the conclusions of the EGP. Figure 6.2 illustrates employment change by sector for the three core scenarios. In line with the findings of the EGP, additional growth is concentrated in the Health, Information & Communications, Professional, Scientific & Technical and Transport & Storage sectors.

Figure 6.2: Additional employment growth by sector – scenarios



Floorspace requirement (sqm)

6.17 Drawing together the results from the alternative employment growth scenarios, Table 6.2 summarises the net floorspace requirement over the period 2023-2041 by core E(g) and B-class use.

Table 6.2: Net floorspace requirements (sqm), 2023-2041

Scenario	Sqm			
	E(g)	B2	B8	Total
Baseline (REM)	105,568	-7,102	104,328	202,794
Higher Growth (REM+) - Lower	136,680	1,420	126,183	264,283
Mid-point - Higher Growth Scenario	155,175	4,203	155,320	314,698
Higher Growth (REM+) - Upper	173,670	6,987	184,457	365,113

Note – figures include rounding.

6.18 These forecasts reflect a range of potential space requirements. For E(g) space the range is between +105,568 sqm and +173,670 sqm. For industrial space, it is between –7,102 sqm to +6,987 sqm. For distribution, the range of requirement is between 104,328 sqm and +184,457 sqm.

Net employment land requirement (ha)

6.19 Net floorspace requirements are translated into net land requirements by applying a plot ratio (using the plot ratios established in Appendix 1). The resulting land requirements are set out in Table 6.3.

Table 6.3: Net land requirements (ha), 2023-2041

Scenario	Net land (Ha)			
	E(g)	B2	B8	Total
Baseline (REM)	12.1	-2.0	29.8	39.9
Higher Growth (REM+) - Lower	15.7	0.4	36.1	52.2
Mid-point - Higher Growth Scenario	17.8	1.2	44.4	63.4
Higher Growth (REM+) - Upper	20.0	2.0	52.7	74.7

Note – figures include rounding.

Gross employment land requirement (ha)

6.20 Adding a margin of choice yields allows for replacing future losses and providing choice and competition in the market (see appendix for more detail). This yields the gross employment land requirement.

Table 6.4: Gross land requirements (ha), 2023-2041

Scenario	Gross land (Ha)			
	E(g)	B2	B8	Total
Baseline (REM)	15.8	-1.5	39.0	53.3
Higher Growth (REM+) - Lower	20.4	1.2	47.0	68.6
Mid-point - Higher Growth Scenario	23.2	2.1	57.8	83.0

Higher Growth (REM+) - Upper	26.0	3.0	68.6	97.5
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Note – figures include rounding.

Table 6.5: Gross land requirements, annual average (ha), 2023-2041

Scenario	Gross land (Ha) - Annual average			
	E(g)	B2	B8	Total
Baseline (REM)	0.9	-0.1	2.2	3.0
Higher Growth (REM+) - Lower	1.1	0.1	2.6	3.8
Mid-point - Higher Growth Scenario	1.3	0.1	3.2	4.6
Higher Growth (REM+) - Upper	1.4	0.2	3.8	5.4

Note – figures include rounding.

6.21 Overall, the results indicate a gross employment land requirement over the ELR period in the range of +53.3 ha to +97.5 ha. This equates to an annual average of between +3.0 ha and +5.4 ha.

6.22 Across the use classes, in the higher growth scenarios the greatest requirement is for B8 space closely followed by E(g) space. This is largely driven by the growth of the Professional Services and Transport & Distribution sectors. There is a positive E(g) and B8 requirement across the range of employment growth scenarios tested. For B2 space, the requirement is negative in the baseline scenario with relatively small positives under both higher growth scenarios.

Sensitivity test - Adjusting for changing working practices

6.23 To allow for changing working practices toward more home-based and hybrid working patterns, a 30% reduction is applied to E(g) needs. The adjusted results are shown in tables 6.6 and 6.7.

Table 6.6: Gross land requirements (ha) with working practices adjustment, 2023-2041

Scenario	Gross land (Ha)			
	E(g)	B2	B8	Total
Baseline (REM)	11.0	-1.5	39.0	48.5
Higher Growth (REM+) - Lower	14.3	1.2	47.0	62.4
Mid-point - Higher Growth Scenario	16.2	2.1	57.8	76.1
Higher Growth (REM+) - Upper	18.2	3.0	68.6	89.7

Note – figures include rounding.

Table 6.7: Gross land requirements, with working practices adjustment, annual average (ha), 2023-2041

Scenario	Gross land (Ha) - Annual average			
	E(g)	B2	B8	Total
Baseline (REM)	0.6	-0.1	2.2	2.7
Higher Growth (REM+) - Lower	0.8	0.1	2.6	3.5
Mid-point - Higher Growth Scenario	0.9	0.1	3.2	4.2
Higher Growth (REM+) - Upper	1.0	0.2	3.8	5.0

Note – figures include rounding.

6.4 Labour supply

6.24 In relation to demographically derived assessments of future employment needs (labour supply techniques), it is noted that Edge Analytics was commissioned by the Council to undertake scenario work. Edge Analytics worked with arc4 to develop a Strategic Housing Market Assessment (SHMA) for Bradford.

6.25 In their report ('Evidence to inform the Strategic Housing Market Assessment', 2024), they explore a range of demographic growth scenarios for Bradford. These scenarios have been developed using POPGROUP forecasting technology and the latest demographic statistics, including household statistics from the 2021 Census, and the first post-Census MYE (2021). The scenarios produce a range of population, household, dwelling, labour force and employment growth outcomes, to consider alongside the benchmark scenario linked to the Standard Method LHN figure for Bradford.

6.26 The report shows that to support the level of employment growth under the 'high growth' scenario would, given the underlying assumptions, require a level of dwelling growth similar to (but higher than) LHN. However, if unemployment rates were to improve in response to the forecast employment growth, then the dwelling growth outcomes would be lower in this scenario. This is illustrated in the unemployment rate sensitivity (UR SENS) variant of this scenario. Please refer to the Edge Analytics report for detailed figures and assumptions.

6.27 The Council is mindful of evidence base consistency and that strategic policies need to be aligned for the Local Plan.

6.5 Historic take-up

6.28 Historic data on the take-up of employment land can provide useful insight into the shape and scale of demand. It is an additional part of the picture, to be considered alongside other evidence such as the econometric forecasts.

6.29 In some instances, historic long-term take-up can provide a reasonable basis for informing future land requirements. When land supply or demand has not been constrained historically it can provide a good metric. The future demand

picture may not necessarily reflect past trends however and some caution may be required.

6.30 Authority Monitoring Reports (AMRs) published by CBMDC provide data on past take-up. The AMR is the main mechanism for assessing the performance and effects of the CBMDC Development Plan and the timescales set out in the Local Development Scheme (LDS). Monitoring work feeds into the preparation of Local Plan documents and as such forms critical evidence for the Bradford District Local Plan.

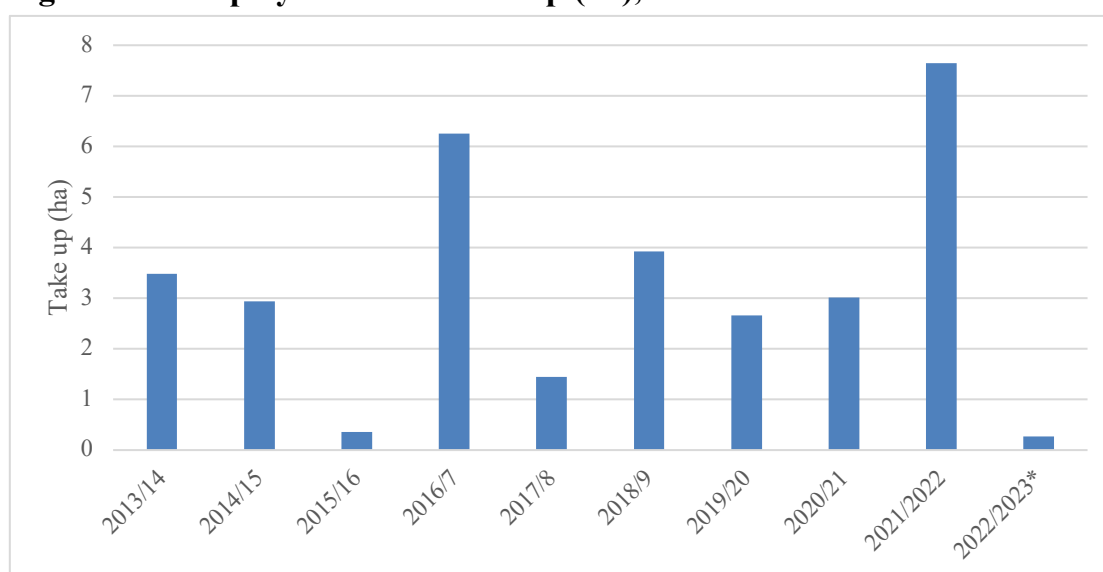
6.31 It is important to note that these figures refer to completions and that these averages are based on a relatively small number of years. It is not possible to determine the extent to which this take-up represents net new vs. replacement demand. Losses have not been recorded over a sufficiently long period to form a view on past trends. Accordingly, the figures should be treated with caution.

6.32 Further, to some extent land supply and demand has been constrained in Bradford historically. There was no district wide local plan to top-up land supply in the last 10 years (whilst there were AAP's during this period, these did not include the majority of Bradford or the larger towns such as Keighley and Bingley). Accordingly, historic take-up may not provide a strong basis for informing future land requirements.

6.33 Figure 6.3 shows the annual take-up over the period 2013-2023. This shows significant variation year to year, with particularly pronounced higher figures in 2016/17 and 2021/22.

6.34 Taking the 10-year period 2013-2023, the average annual take-up figure is 3.2ha. Taking the most recent 5-year period 2018-2023, the figure is 3.5ha.

Figure 6.3: Employment land take-up (ha), 2013-2023



Source: Using Council data.

6.35 Table 6.8 shows the detailed breakdown of take-up by use-class for each year. In the two peak years (2016/17 and 2021/22), the majority of this take up was B8 (2016/17) and B2 space (2021/22).

Table 6.8: Historic take-up by use-class, 2013-23

Year	Net Take Up (Ha)*	Take Up (sqm)					Total Take Up (sqm)
		E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	
2013-2014	3.48	3,036	0	0	4,880	1,006	8,922
2014-2015	2.94	0	0	5,752	1,360	0	7,112
2015-2016	0.36	0	0	1,800	0	0	1,800
2016-2017	6.25	1,534	0	1,741	1,723	18,074	23,072
2017-2018	1.45	285	0	4,056	5,904	86	10,331
2018-2019	3.93	1,517	40	1,200	11,950	6,576	21,283
2019-2020	2.66	1,771	0	4,232	1,668	1,730	9,401
2020-2021	3.01	180	0	2,600	4,916	4,095	11,791
2021-2022	7.64	1,460	0	482	20,944	1,902	24,788
2022-2023*	0.27	-948	0	0	2,131	85	1,268
Total 2013-2023	31.99	8,835	40	21,863	55,476	33,554	119,768
*Includes losses							

Source: Council data.

6.36 Table 6.9 shows the aggregate split of take up by use-class using 10-year (2013-23) and 5-year (2018-23) time periods. This shows that B2 accounted for the largest proportion of take-up for both periods, with this growing as a proportion in the most recent 5 years. Comparing the 10 year and 5-year periods also shows that the E(g) and B8 take-up has decreased as a proportion of total take-up.

Table 6.9: Aggregate take up by use-class, sqm

Period	E(g)	B2	B8	Total
10-year total	30,738	55,476	33,554	119,768
% of total	25.7%	46.3%	28.0%	100.0%
Annual average	3,074	5,548	3,355	11,977
5-year total	12,534	41,609	14,388	68,531
% of total	18.3%	60.7%	21.0%	100.0%
Annual average	2,507	8,322	2,878	13,706

Source: Using Council data.

6.37 Table 6.10 projects these average annual historic rates forward over the plan period. This suggests that if past trends were replicated in the future, this suggests a net land requirement of between 57.6ha and 63.0ha.

Table 6.10: Net land requirement based on historic take-up, ha

Historic take-up average	Net land requirement (ha), 2023-2041			
	E(g)	B2	B8	Total
Long-term (10-year)	14.8	26.7	16.1	57.6
Short-term (5-year)	11.5	38.3	13.2	63.0

Source: Using Council data.

6.38 This approach assumes that past trends of development continue unchanged and may not fully reflect changes in the economy. It should be noted that no adjustment for changing working practices and E(g) demand has been made.

6.39 To estimate a gross land requirement, the same steps are applied as with econometric forecasts. The results are provided in Table 6.11.

Table 6.11: Gross land requirements (ha), 2023-2041

Historic take-up average	Gross land requirement (ha), 2023-2041			
	E(g)	B2	B8	Total
Long-term (10-year)	19.2	34.7	21.0	74.9
Short-term (5-year)	15.0	49.8	17.2	81.9

Source: Using Council data.

6.6 Summary of requirement

6.40 In summary, the total range of total gross land requirements for 2023-2041 results in the following demand projections:

Table 6.12: Summary of results

	Net requirement (ha)	Margin (ha)	Gross requirement (ha)	With working practices adjustment
Econometric forecasts (labour demand)	39.9 – 74.7	13.4 – 22.8	53.3 – 97.5	48.5 – 89.7
Historic take-up (LT)	57.6	17.3	74.9	n/a
Historic take-up (ST)	63.0	18.9	81.9	n/a

6.7 Conclusions

6.41 The analysis shows that estimates of future demand for employment land differ across approaches. Consequently, there is a need to carefully consider the evidence in aggregate. The following table provides a summary:

Table 6.13: Conclusions - Summary

Scenario	Gross land (Ha)			
	E(g)	B2	B8	Total
Econometric forecasts (labour demand)	11.0 – 18.2	-1.5 – 3.0	39.0 – 68.6	48.5 – 89.7
Projecting forward historic take-up	15.0 – 19.2	34.7 – 49.8	17.2 – 21.0	66.9 – 90.0

Note – figures include rounding. E(g) requirement includes working practices adjustment. The range presented for projecting forward historic take-up reflects a combination of the ST and LT figures in Table 6.11.

6.42 In considering the implications of these findings, it is important to adhere to the requirements of PPG which states that local authorities should develop an estimate of future employment land requirements by taking into account a range of qualitative and quantitative forecasts and data sources. As outlined earlier in this section, there are inevitable uncertainties and limitations associated with each of the approaches when applied in isolation.

6.43 In the case of Bradford, a weakness of planning on the basis of historic take-up is that it is reasonable to conclude that the development activity in the past may have been constrained due to limited availability of land. Emerging new economic development policy is also committed to steering the economy on a new path, with greater emphasis on unlocking investment and growth in the Professional Services and related sectors.

6.44 **Whilst accepting that there are also limitations to the use of local level econometric forecasts, it is considered that these more closely capture the key changes in the economy and characteristics of future growth. In aggregate, it is recommended that Bradford's employment land requirement in the plan period 2023-2041 is in the range of 62.4 ha to 89.7 ha. This equates to the Higher Growth REM+ Lower scenario at the lower end of the range and the Higher Growth REM+ Upper scenario at the upper end.** It also includes an adjustment to account for changing working practices in offices.

6.45 It is recognised that the econometric forecast-based approach only generates a small need for B2 space. This arises since growth according to these forecasts is focussed in the Professional Services sector and related sectors, and sectors associated with distribution type uses. It is also important however to take into due consideration local economic and commercial market intelligence – including that obtained through engagement of local agents, businesses and economic development stakeholders. In particular, this highlights strong demand for B2 space and a need to provide a sufficient supply of suitable sites to enable existing established industrial businesses – including in the manufacturing sector - to grow in the future. This space also needs to be in the right locations, providing choice in the key settlements and near existing business clusters.

6.46 Accordingly, it is recommended that the Council consider planning for an additional allowance for B2.

- 6.47 There is evidence to suggest that there have been significant losses of employment land historically in Bradford. Accordingly, it is considered prudent to make an allowance for at least partial replacement going forward and to also consider the case for future safeguarding. This is captured within the margin allowance.
- 6.48 This report does not seek to make a planning or policy judgement (these matters are for the Council to decide). Deciding on the final employment land requirement will depend on the preferred level of employment growth in Bradford and by the extent to which officers consider that this aligns with the Council's economic strategy and housing target.

7 Demand-Supply Balance

7.1 Overview

- 7.1 This section draws together the findings of the supply analysis in Section 5 and the demand analysis in Section 6. The purpose is to identify whether there is any need for additional employment space, or whether there exists a surplus.
- 7.2 In assessing the demand-supply balance, both quantitative and qualitative aspects are important. This section considers the quantitative balance and qualitative demand side factors only. It is noted that the Council is producing a separate Site Assessment document considering site suitability and spatial aspects.

7.2 Quantitative demand-supply balance

- 7.3 On the demand-side, the estimated requirement is in the range of 48.5 ha to 89.7 ha (including an adjustment for changing working practices). As stated earlier, it is recommended that Bradford's employment land requirement in the plan period 2023-2041 is aligned with the lower and upper bounds of the Higher Growth Scenario (with a range of 62.4 ha to 89.7 ha).
- 7.4 On the supply side, the latest supply position indicates an aggregate supply of 94.2 hectares.
- 7.5 Considering the balance, there is a surplus of land across the range.

Table 7.1: Demand-supply balance (ha), 2023-2041

	Demand-supply balance		
	REM Baseline	Higher Growth - Lower	Higher Growth - Upper
Employment Land Requirement (ha)*	48.5	62.4	89.7
Estimated Employment Land Supply	94.2	94.2	94.2
Surplus (+) / Shortfall (-)	+45.7	+31.8	+4.5

*including adjustment for changing working practices. Figures are rounded

- 7.6 Examining the balance by use class, there is a surplus of E(g) and B2 land in both lower and upper ends of the range. In contrast, there is a shortfall of B8.

Table 7.2: Demand-supply balance by use class (ha), 2023-2041

Scenario	Demand-supply balance							
	Higher Growth - Lower				Higher Growth - Upper			
	E(g)	B2	B8	Total	E(g)	B2	B8	Total
Employment Land Requirement (ha)*	14.3	1.2	47.0	62.4	18.2	3.0	68.6	89.7
Estimated Employment Land Supply	31.3	42.0	20.9	94.2	31.3	42.0	20.9	94.2
Surplus (+) / Shortfall (-)	+17.0	+40.8	-26.1	+31.8	+13.1	+39.0	-47.7	+4.5

Note – figures include rounding.

7.3 Quantitative demand-supply balance

7.7 Even if a deficit of balance is not identified, there are several qualitative factors which may mean that additional land is required. These include to:

- Address specific gaps in the provision of particular types of premises;
- Improve choice;
- Improve quality; and
- Balance the spatial distribution of employment sites.

7.8 In the office market, whilst existing availability is good in terms of scale there is potential to improve quality in order to attract new occupiers to Bradford (such as the One City Park development). Engagement indicated that a higher quality offer and critical mass is needed in Bradford is required to attract occupiers. Leeds is in close proximity and is currently dominant in this market. Ensuring an adequate supply of quality office space with access to amenities in the city centre will be important in supporting growth aspirations in terms of jobs growth in the Professional Services and related sectors.

7.9 In the industrial market, the findings of engagement indicate that it will be important to ensure sufficient supply of sites in the key settlements to facilitate the growth of existing indigenous businesses. Many of these businesses have been long established in their locations with established local labour pools. Without suitable premises for expansion, there may be a loss of these businesses from the District or constrained growth in these businesses. Agents indicate that proximity to key traffic corridors (e.g. motorways) is the most cited characteristic that occupiers were looking for. Ensuring the availability of sufficient allocations around the M606 was highlighted.

7.4 Implications

7.10 As outlined above, there is a surplus of employment land overall – depending on the level of growth pursued by the Council. On the basis of the balances

across use classes, it is recommended that the Council gives consideration to identifying and allocating additional sites that are considered suitable and deliverable for B8 employment uses.

- 7.11 More broadly, there is need to ensure a sufficient spatial distribution of employment space across the settlements and ensure provision of high-quality city centre locations for E(g).
- 7.12 It is also recommended that allocations ensure sufficient opportunity for economic clustering rather than providing a dispersed portfolio of sites. This is particularly important in supporting existing manufacturing clusters in and around the key settlements and in supporting newer developing clusters such as the Professional Services and knowledge-based services in city centre locations.

Appendix 1 – Employment Land Need Methodology

This appendix outlines the key components of the methodology in translating employment forecasts to employment floorspace requirements.

Mapping employment in different sectors to E(g)/B class

The employment forecasts provide forecasts for 12 industrial sectors. Through the analysis undertaken for this paper, the composition of employment in these sectors has been considered in order to estimate the percentage of employment that can typically be expected to take place in E(g)/B-class employment floorspace. The analysis does not estimate requirements for retail floorspace. These requirements are not within scope.

Table A1.1 outlines the distribution of space requirement by use class for employment growth in each of the 12 industrial sectors. For example, this shows that 100% of new jobs in the Finance & insurance sector are expected to require B1 office space. FTE jobs are conventionally used to estimate employment floorspace requirements.

Table A1.1: Employment sectors to B-class uses

	Sectors	Use class			
		Office	Ind	Dist	Total E(g)/B
1	Accommodation, Food Services & Recreation	0%	0%	0%	0%
2	Agriculture, Forestry & Fishing	0%	0%	0%	0%
3	Construction	0%	0%	0%	0%
4	Extraction & Mining	0%	0%	0%	0%
5	Finance & Insurance	100%	0%	0%	100%
6	Information & communication	100%	0%	0%	100%
7	Manufacturing	5%	85%	10%	100%
8	Professional & Other Private Services	95%	2%	0%	97%
9	Public Services	61%	0%	0%	61%
10	Transport & storage	5%	0%	60%	65%
11	Utilities	5%	7%	1%	13%
12	Wholesale & Retail	5%	4%	49%	58%

Source: Edge (2023).

These assumptions are based on professional experience and established convention applied in undertaking employment need studies nationally as well as best practice guidance on Employment Land Reviews.

Not all employment growth will be associated with allocated employment sites; a considerable proportion of jobs in any area will be associated with existing facilities, such as Public Health and Education that will accommodate significant employment growth within existing premises. Accordingly, it is important to

take account of the distinction between growth in economic activity that requires additional employment and that instead arises from productivity gains.

Translating employment by use class to floorspace (sqm)

In order to translate employment by use class into floorspace requirements, an average employment density (sqm per FTE job) is applied. This works out the gross external area of floorspace, i.e. the footprint of buildings.

Recent guidance in relation to employment densities published by the HCA is utilised, as outlined in Table A1.2.

Table A1.2: Employment densities

Use type	sqm per job	HCA Guide
Office space	12	Average of densities across B1a and B1b uses
Industrial space	47	Average of densities in B1c and B2
Storage and Distribution	70	Average of densities in B8

Source: 'Employment Density Guide' 3rd Edition, HCA (November 2015).

Translating floorspace to net land requirements (ha)

The net land requirement (ha) is the land required before replacement of employment land losses and providing choice/competition in the market are considered.

The net land requirement (ha) is estimated by translating floorspace requirements using a plot ratio.

Plot ratios describe the difference between the level of employment floorspace on a site and the site area. Plot ratios are influenced by the nature and location of development as well as other factors such as the height of buildings, parking standards and other space requirements on the site (e.g. green space and communal areas). They can vary significantly from development to development.

For example, a plot ratio of 0.4 means that a development of 10,000 sqm gross external area (GEA) would require 25,000sqm of land (2.5ha).

The average plot ratios applied in this analysis are outlined in Table A1.3.

Plot ratios for office development typically vary more than industrial and distribution uses. We have assumed that 80% of office demand is in city centre and town centre locations with a plot ratio of 1. The remaining 20% of demand is assumed to be in business park locations with a plot ratio of 0.35.

Table A1.3: Plot ratios

Use type	Plot ratio
Office	0.87
Industrial	0.35
Distribution	0.35

Source: Edge (2023).

These ratios are in line with recognised convention applied in ELRs across the country.

Converting net to gross employment land

The net employment land requirement figure is only a part of the process in understanding employment land requirements. Relying on the net figure alone could result in a significant underestimate of land required to support future economic development.

There is a need to make allowances for:

- Replacing the expected future loss of employment sites; and
- Providing for choice and competition in the market.

The approach to these in the ELR is to include a margin allowance.

Allowing for choice and competition in the market is important. Land can remain in the development pipeline for a long time without delivering new floorspace. It is also important to account for potential non-delivery of sites.

At any one time there is a need to ensure that there is enough readily available (unconstrained) land to meet the gross requirement for each employment use. It is not desirable to have an exhausted land supply at the end of the plan period i.e. no choice available.

ELRs nationally typically apply a margin based on a % uplift or alternatively apply a margin based on years of supply using historic take-up data. In this ELR, a margin of 30% is applied.

Appendix 2 – Bradford District’s Employment Allocations

Table A2.1 lists the 87 sites allocated for employment use through the RUDP (Policy E1) and the nine sites in the Adopted AAPs and identifies the position of each site at Regulation 18.

The allocations can be viewed online; [RUDP Proposals Map](#), [Bradford City Centre AAP](#) and [Shipley and Canal Road Corridor AAP](#).

Table A2.1: Employment allocations

Reference	Name	Settlement	Original Site Size (Hectares)	Remaining availability (Hectares)	Regulation 18 Position
RUDP					
BN/E1.1	Neville Road/Lower Lane	Bradford	1.17	1.57	Re-allocate for Employment ¹
BN/E1.11	Dick Lane	Bradford	0.55	0.55	Re-allocate for Employment
BN/E1.12	Gain Lane	Bradford	7.06	0	No longer available
BN/E1.13	Victoria Road	Bradford	0.65	0	De-allocate
BN/E1.14	Harrogate Road	Bradford	3.26	1.52	Re-allocate for Housing
BN/E1.15	Canal Road	Bradford	0.57	0	No longer available
BN/E1.16	Parry Lane	Bradford	0.86	0	De-allocate
BN/E1.17	Woodhall Road	Bradford	9.85	4.13	Re-allocate for Employment
BN/E1.2	Neville Road	Bradford	0.70	0	No longer available
BN/E1.3	Birch Lane	Bradford	2.11	0	No longer available
BN/E1.4	Hammerton Street	Bradford	0.78	0	No longer available
BN/E1.5	Buck Street	Bradford	0.89	0	No longer available
BN/E1.6	Steadman Street	Bradford	0.43	0.43	Re-allocate for Housing
BS/E1.1	Ingleby Road	Bradford	3.25	3.25	Re-allocate for Employment
BS/E1.11	Cross Lane	Bradford	4.91	0	De-allocate
BS/E1.12	Westgate Hill Street	Bradford	1.50	1.50	Re-allocate for Employment
BS/E1.13	Cordingley Street	Bradford	0.49	0.49	Re-allocate for Housing
BS/E1.14	Shetcliffe Lane	Bradford	0.96	0.48	Re-allocate for Employment
BS/E1.15	Kaycell Street/Burnham Avenue	Bradford	2.83	0.62	Re-allocate for Housing
BS/E1.16	West Bowling Golf Course	Bradford	35.23	0	No longer available
BS/E1.17	Wharfedale Road	Bradford	0.62	0	No longer available
BS/E1.18	Merrydale Road	Bradford	1.96	0	Superseded by Waste Management DPD
BS/E1.19	Woodlands Farm	Bradford	9.48	0	No longer available
BS/E1.2	Northside Road	Bradford	0.47	0.47	Re-allocate for Housing
BS/E1.20	Roydsdale Way	Bradford	1.01	0	No longer available
BS/E1.21	Commondale Way	Bradford	0.46	0.46	Re-allocate for Employment
BS/E1.22	Staithegate Lane South	Bradford	2.87	2.87	Re-allocate for Employment
BS/E1.23	Cleckheaton Road	Bradford	5.03	0	No longer available
BS/E1.23	Cleckheaton Road	Bradford	2.34	0	No longer available
BS/E1.24	New Works Road	Bradford	0.72	0	No longer available
BS/E1.25	Dealburn Road	Bradford	1.69	0	De-allocate
BS/E1.26	Wyke Lane	Bradford	5.42	5.42	Re-allocate for Employment
BS/E1.27	Stockton Road	Bradford	0.63	0	No longer available
BS/E1.28	Dealburn Road	Bradford	0.69	0	No longer available
BS/E1.29	Spartan Road	Bradford	1.00	0	No longer available
BS/E1.3	Hollingswood Lane	Bradford	2.31	0	De-allocate
BS/E1.31	Royds Hall Lane	Bradford	4.65	0	No longer available
BS/E1.4	Brackenbeck Road	Bradford	1.57	0	De-allocate
BS/E1.5	Havelock Street	Bradford	0.74	0	No longer available
BS/E1.6	Chase Way	Bradford	7.34	0	No longer available

Reference	Name	Settlement	Original Site Size (Hectares)	Remaining availability (Hectares)	Regulation 18 Position
BS/E1.7	Staithgate Lane North	Bradford	12.18	5.82	Re-allocate for Employment
BS/E1.8	Mandale Road	Bradford	1.21	0	No longer available
BS/E1.9	Brighthouse Road	Bradford	2.39	2.39	Re-allocate for Housing
BW/E1.1	Ripley Road	Bradford	0.61	0	No longer available
BW/E1.12	Great Horton Road	Bradford	0.50	0	No longer available
BW/E1.15	Legrams Lane	Bradford	0.94	0	No longer available
BW/E1.16	Legrams Lane/Brownroyd Street	Bradford	0.40	0	No longer available
BW/E1.17	Princeroyd Way	Bradford	2.01	0	Superseded by Waste Management DPD
BW/E1.2	Ripley Road	Bradford	0.41	0	No longer available
BW/E1.3	Ripley Road	Bradford	0.82	0	Superseded by Waste Management DPD
BW/E1.4	Prospect Street/Rouse Fold	Bradford	0.82	0	No longer available
BW/E1.5	Ripley Street/Bolling Road	Bradford	2.22	0	De-allocate
BW/E1.6	Spring Mill Street/Upper Castle Street	Bradford	2.41	0	No longer available
BW/E1.7	Bowling Old Lane	Bradford	1.28	0	No longer available
BW/E1.8	Bell Dean Road	Bradford	1.68	0	No longer available
BW/E1.9	Thornton Road	Bradford	6.68	6.68	Re-allocate for Housing (U/C for housing)
K/E1.10	Backstone Way	Ilkley	1.25	0	No longer available
K/E1.11	Ashlands Road	Ilkley	1.03	0	De-allocate
K/E1.12	Aire Valley Road	Keighley	2.80	0	Superseded by Waste Management DPD
K/E1.13	Dalton Lane	Keighley	0.77	0	De-allocate
K/E1.14	Aireworth Road	Keighley	1.73	0	De-allocate
K/E1.15	Mitchell Street	Keighley	0.86	0	De-allocate
K/E1.16	East Avenue	Keighley	0.60	0	De-allocate
K/E1.17	Holme Mill Lane	Keighley	0.79	0.76	Re-allocate for Housing
K/E1.18	Beechcliffe	Keighley	9.54	3.3	Re-allocate for Employment
K/E1.2	Steeton Grove	Keighley	1.19	0	No longer available
K/E1.23	Bradford Road	Keighley	1.49	0.8	Re-allocate for Employment
K/E1.3	Station Road	Keighley	0.56	0	De-allocate
K/E1.5	Belton Road	Keighley	4.99	0	No longer available
K/E1.6	Keighley Road (North)	Keighley	0.53	0	No longer available
K/E1.7	Keighley Road (Centre)	Keighley	0.69	0	De-allocate
K/E1.8	Keighley Road (South)	Keighley	1.04	0	No longer available
K/E1.9	Sykes Lane	Keighley	2.38	2.38	Re-allocate for Housing
S/E1.1	Otley Road/Hollins Hill	Shipley	1.84	0	De-allocate
S/E1.10	Castlefields Road	Bingley	0.85	0	No longer available
S/E1.11	Main Street	Wilsden	0.62	0	De-allocate
S/E1.12	Manywells Industrial Estate	Cullingworth	4.27	0	De-allocate
S/E1.13	Manywells Industrial Estate	Cullingworth	0.94	0	No longer available
S/E1.14	Land Adjacent Airedale Route	Bingley	1.05	0	De-allocate
S/E1.15	Dockfield Road	Shipley	0.98	0	De-allocate
S/E1.16	Thackley Old Road	Shipley	0.41	0	No longer available
S/E1.3	Buck Lane/Otley Road	Shipley	6.31	0	No longer available
S/E1.4	Dowley Gap Lane	Bingley	2.00	0	De-allocate
S/E1.6	John Escritt Road	Bingley	0.50	0.50	Re-allocate for Employment
S/E1.7	Keighley Road	Bingley	1.76	0	De-allocate
S/E1.8	Keighley Road	Bingley	3.80	3.04	Re-allocate for Housing
S/E1.9	Castlefields Lane	Bingley	0.72	0	De-allocate
Bradford City Centre Area Action Plan (AAP)					
B/1.3	Jacobs Well Public Service Hub	Bradford	1.01	1.01	Re-allocate for Employment
B/1.2	No.1 City Park	Bradford	0.41	0.41	Re-allocate for Employment
B/1.4	Exchange Court	Bradford	0.86	0.86	Re-allocate for Employment
B/1.5	Former Yorkshire Water Depot	Bradford	1.07	0	Re-allocate for Housing
V/1.9 ²	Sunwin House	Bradford	0.39	0	De-allocate

Reference	Name	Settlement	Original Site Size (Hectares)	Remaining availability (Hectares)	Regulation 18 Position
Shipley and Canal Road Corridor Area Action Plan (AAP)					
DF4 ²	Dockfield Road North/ Dockfield Road South	Shipley	1.25	0	Re-allocate for Housing
DF3 ²	Land between Leeds Road and Dock Lane	Shipley	0.71	0	Re-allocate for Housing
DF2 ²	Junction Bridge, Briggate	Shipley	0.75	0	De-allocate
DF1 ²	Dock Lane, Canalside	Shipley	2.01	0	De-allocate

¹Proposed site boundary change at Regulation 18 Local Plan. Site capacity increased to 1.57 hectares.

²Mixed-use sites which including office.